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WORKING PAPER NO. 1
CITY OF BERKELEY
DOWNTOWN BUSINESS LOCATIONAL FACTORS
SURVEY REPORT

Submitted to:
The Downtown Plan Committee


Submitted by:
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City of Berkeley
Office of Economic Development

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EXECUTIVE SUMMARY

This paper summarizes the findings of a survey of merchants conducted in September 1987. The objectives of the survey were to identify the factors that affect location of retail establishments to or from the downtown.

Briefly the findings are:

- o Businesses locate to the downtown because it is a good market, that is, the downtown is close to the University campus, it is an urban, busy place with lots of traffic and an affluent market potential.
- o Businesses go out of business or cease operating in the downtown or elsewhere for reasons that are not related to the downtown such as financial over extension, corporate restructuring, etc.
- o Businesses do not select the downtown because, they are unaware of the downtown's existence, because they locate to serve a specific clientele served in other areas, or because the area looks dirty and unsafe.
- o Businesses leave the downtown and locate elsewhere because of rent increases, inability to find sufficient space to meet expansion needs, insufficient parking, or general frustration with city politics.

The downtown is quite easy to get to and move around in. Parking is extremely difficult for shoppers because of the decreasing supply of parking slots and spaces and for employees because of the costs of long-term parking.

Traffic and street lighting are the most positive factors of the downtown, litter is the most negative. Sunlight, wind and noise are neutral issues for downtown businesses.

College students, office workers, and the elderly have the most positive impact on downtown businesses. The homeless have the greatest negative impact on downtown businesses and children are neutral.

Crime is perceived to be higher in the downtown than the actual incidents of crime. Safety and security are important issues to businesses.

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WORKING PAPER NO. 1

OBJECTIVE: Identify the Factors that Affect Location of Retail Establishments to or from the Downtown.

Introduction:

The purpose of this working paper is to summarize the factors characteristic of the Downtown that affect the location decisions of retail firms.

This paper is intended to enhance the planning efforts of the Downtown Plan Committee which is devising strategies for the Downtown. The information contained in this working paper is to supplement the data included in the economic element of the Downtown Plan.

At the initiation of the Downtown planning effort, the central questions focused on (1) the reasons why certain types of retail businesses locate in or out of the downtown; (2) the relationship between different land uses and the impact on the retail market; and, (3) whether or not certain types of development preclude another type of development.

This report is the first of four documents that, together, will address these questions. As a first step, this document concentrates on why businesses choose to locate into or out of the downtown. Some of the findings in this report will offer insights into the other questions, but without the completion of the other studies, these insights can only whet our appetites about the possible ramifications these findings will have on the planning efforts.

Companion documents (Working Papers No. 2, 3, and 4) will be submitted subsequent to this report and will discuss, the following:

Working Paper 2: The constraints and opportunities that encourage the development of mixed-uses (housing/retail/commercial) in the downtown.

Working Paper 3: How to improve the retail market potential of the downtown.

Working Paper 4: How different land-uses are interrelated in the downtown in terms of balance, rents, and economic impact.

THE UNITED STATES OF AMERICA

IN SENATE
JANUARY 10, 1912

REPORT

OF THE
COMMISSIONER OF THE GENERAL LAND OFFICE
IN RESPONSE TO A RESOLUTION PASSED BY THE SENATE
JANUARY 10, 1912

AND IN ANSWER TO A RESOLUTION PASSED BY THE HOUSE OF REPRESENTATIVES
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This report is based upon a special survey of 29 retail businesses conducted in September 1987 by the City of Berkeley, Office of Economic Development. The businesses were divided into the following four types of establishments:

1. Businesses that have moved from the Downtown to other Berkeley neighborhoods;
2. Businesses that have moved from the Downtown and have left Berkeley;
3. Businesses that are new to the Downtown area since 1983;
4. Businesses that are new to Berkeley since 1983, but that have not located in the downtown.

The first three groups were selected for obvious reasons. The fourth group was selected to determine whether or not any attributes about the Downtown contributed to a decision not to locate in that area.

It is important to understand that a location decision is a major decision for all businesses. The costs of moving, closing, or starting a business are so great that businesses think very carefully about the consequences. Location is not a whimsical process -- it requires some understanding of the market, the potential for getting customers or clientele to or from the place of business, the demand for goods and or services, and the potential long-range profitability.

Moving requires substantial out-of-pocket expenses and a significant investment of time, energy and expense. For a "mom and pop", a small locally owned business, time is more than money; it is often one's very livelihood.

Site selection, securing leases, renovation, stocking, connecting utilities, obtaining licenses and permits, etc., take about three months or more. For small businesses, this means three months with no income and large expenditures. Very often, a decision to locate in a particular area is a decision to stay in a certain area for as long as possible.

Therefore, it was with great respect for the business community that this survey was undertaken to identify those factors inherent in the Downtown that contributed to a decision to relocate from, or move into the area.

Methodology:

The survey was designed to obtain a concise understanding of the locational factors that have the greatest impact on decision-making of private retail establishments. It was not, however, designed to be a "scientific survey" having precise statistical or mathematical significance. The value of this survey lies in the understanding of business concerns and in identifying which of those concerns the city has some power to affect.

For example, the level of competition for like businesses, how much or how little visibility one desires, and the quality of goods and services that exist in one area or another are market issues that businesses people themselves control when they select a business or locate a site. On the other hand, street lighting, traffic, parking, etc., are issues that the city has primary control over and that can affect location decisions.

Issues of potential concern to businesses and items which this survey focused on were drawn from the 1985 Downtown Merchant's Survey conducted by the City of Berkeley, Planning Department. Locational factors which emerged from that survey included crime, parking, city policies and services. This survey explored some of those factors in greater detail and attempted to obtain more information as to the exact nature of these issues.

This survey was divided into six parts. Part I sought general information about business tenure and the principal reasons why the business selected the Downtown or moved. Part II compared the Downtown to other areas according to the general locational factors that were identified by merchants in 1986. Part III concentrated on city services and policies. Part IV isolated accessibility and parking issues. Part V centered on the Downtown's physical environment; and Part VI explored the occurrence of crime in the Downtown. Four sets of surveys were devised so that the questions could be tailored for each business group. Copies of each survey instrument are attached.

The methods used to select the businesses that would be surveyed included a comparison of Business License data for 1983 and 1986, and staff identification of businesses locating to or that have closed or left the Downtown since 1986. Within this broad grouping, further selection

occurred. Businesses that have moved from the Downtown or that are new to Berkeley and that fall within the category of businesses, such as shoe repair shops, identified as desirable by the Downtown Plan Committee were included as well although these are not strictly "retail" establishments. In addition, a non-retail establishment was surveyed because of the impact its relocation had on the perception of change in the Downtown.

A total of 40 businesses have been identified by the staff and through Business License Comparisons. Nearly three-quarters of these were surveyed. The following Table sets out the number of businesses that were identified in each category and the number of businesses that were surveyed. A list of the businesses that were identified and surveyed is attached.

Along the way, it was found that there were some questions that were not relevant to particular businesses so no response was given. For example, some of the businesses surveyed are so new that as of the date of this report, they have not yet opened their doors. On the other hand, some of the businesses surveyed have gone out of business. Therefore, questions relating to the length of time at the present site are irrelevant for both groups. This means that there is a variation in the number of responses to each question asked.

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**NUMBER OF BUSINESSES IDENTIFIED AND SURVEYED,
1987**

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CATEGORY	IDENTIFIED %ofTot		SURVEYED %ofTot		%Surveyed
1. Left Downtown to Other Berkeley	4	10.0	3	10.0	75.0
2. Left Downtown & Left Berkeley	8	20.0	4	14.0	50.0
3. New to Downtown	19	47.0	15	52.0	78.9
4. New to Berkeley	9	23.0	7	24.0	77.8
TOTALS:	40	100.0	29	100.0	72.5

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The following section will discuss the survey findings. The implications of this survey are found in the conclusion.

SURVEY FINDINGS

The following summarizes the findings for all the businesses surveyed. Of particular focus are the characteristics of Downtown, and the parking issues.

PART I: TENURE

FINDINGS: Most of the firms surveyed have been in business for over 10 years; the majority of the new to Berkeley firms have been in business 3-5 years; and nearly half of all businesses surveyed had been at their present location for one year or less.

This series of questions attempted to obtain an understanding about the length of time firms had been in business, how long they had been located in the Downtown or at a previous site, and how long they had been located at their present site. In addition, this section addresses the principal reasons for selecting the present location.

Length of Time in Business

The majority of all the businesses surveyed had been in business for 10 years or more (44%). The second largest category of businesses (24%) had been in business for one year or less.

Those that had been in business for 10 years or more fell into the following groups:

- o Two of the three businesses that "Left the Downtown for other Berkeley areas" had been in business for 10 years or more;
- o All four of the businesses that "Left Berkeley" had been in business for 10 years or more, some for more than 20 years;
- o Nearly half (46.7%) of the fifteen businesses that were "New to the Downtown" had been in business for 10 years or more. Some of these are national chains.

Nearly sixty percent (57.1%) of the "New to Berkeley" group had been in business one year or less.

Length of Time at Previous Location

Of the eight businesses that had been located elsewhere before moving their operation into Berkeley, two businesses had been located elsewhere for 1-3 years, over a third (37.5%) had been located elsewhere for 3-5 years. and 2 businesses had had been at their previous site for 10 years or more.

Length of Time at Present Location

The survey was designed to target businesses that had experienced a change of location since 1983 so that movement within the last four years was expected. It was surprising, however, that over half (53%) of all businesses surveyed had been at their present location for one year or less.

Tenure is an important way of assessing the dynamism of a particular economic era. In addition, length of tenure can illuminate the stability or instability of particular area.

The length of time at the present location combined with the length of time in businesses suggests that business movement is a more recent phenomenon. For example, the survey indicates that within the last year, there are many businesses entering the economic arena for the first time. In addition, those establishments having been in business for ten or more years, many of which are part of national chains, have located to the Berkeley area within the last year or so.

The length of tenure of both of these groups suggest that this activity may be due to broader national economic conditions than to the specific environment in Berkeley. As the nation's economy recovered from the 1982-83 recession, interest rates declined, particularly in the last two years, making more capital resources available for business investment.

Recent drops in the stock market will have ramifications at the local level and it can be expected that businesses planning to relocate or to expand will rethink this option.

Reasons for Locating to Present Site

The principal reasons that businesses selected their present location differed for each group. For those businesses New to the Downtown the most often mentioned reason was that they

thought it would be a "good place to do business". The Downtown had an unfilled niche, a lot of people because of the University, an affluent market for their goods and services, etc. For some businesses, the Downtown proved to be an extremely profitable decision. Two nationwide businesses noted that in comparison with its other stores in other Bay Area communities, the Downtown stores were higher in sales than any other store in the Bay Area.

For a few businesses that had located to the Downtown from other Berkeley areas, their reason for selecting the Downtown was to continue serving their existing clientele. These businesses had specific customers identified with a particular neighborhood or a certain type of client, and were, in general, small locally owned businesses. For those businesses, the primary location criterion was convenience for the existing clientele. Thus, in order to keep those customers, businesses that had to relocate due to increased rents selected areas within a few blocks of their previous location. All of the businesses in this category said that their new site was worse than their previous site and gave parking as the primary issue affecting their businesses. In fact, one business had recently completed an analysis of its businesses compared with other stores in other areas in the East Bay. That study's findings indicated that the store in the Downtown was doing 35% less business in the Downtown than those other stores.

For the Left Downtown and Left Berkeley group the principal reasons become more complicated. It should be noted here, that this group of businesses included a number of businesses that had also gone out of business. Of the 8 businesses that were identified for this category, 4 had gone out of business. Although attempts were made to contact representatives from these businesses, only one was actually contacted. Of these four, however, from newspaper reports and other public information sources, three of these businesses ceased to operate in Berkeley's Downtown because of corporate restructuring, overall economic conditions, and/or over extension of financing and indebtedness. One business ceased operating because the goods and services were no longer attractive to the type of clientele frequenting the Downtown area. It could be said, and it has been said that in the latter case, the city takes some responsibility for contributing to a generally "deteriorating" quality of shopper. Nevertheless, half of all the businesses identified in the category that "Left the Downtown and Left Berkeley" since 1983, did so for reasons that were not specific to

Berkeley or to the Downtown.

Only two of the businesses surveyed left Berkeley for reasons directly attributable to doing business in the Downtown. These reasons had to do with parking, the overall deterioration of the Downtown, and general frustration with city policies to address these issues. Another businesses that "Left Berkeley" stated that their primary reason was their need to expand and their ability to find a landlord willing to build to suit their specific space requirements. Staff was unable to contact the remaining businesses to confirm their status or reasons for leaving the downtown.

Among those businesses that Left the Downtown to Other Berkeley areas, the primary reason for relocating was increasing rent. For some of these businesses, their previous landlords had decided to renovate, the building was being demolished for a larger development, or some other use was occurring in the previously occupied structure.

Among those businesses that were New to Berkeley but located outside the Downtown, only one of those surveyed had actually thought about the Downtown as a potential site. This businesses rejected the Downtown because of the "dirt, low-life, and general ugliness" of the Downtown. The other businesses surveyed in this category had not looked at the Downtown at all as a place to locate. It is important to note that of the 7 businesses surveyed in this category 4 reported they had been in business for one year or less. Some had been in business in other states. One business sold ethnic goods and located near other businesses that catered to this ethnic clientele as well. Another businesses couple said that when they arrived in Berkeley, they did not know that there was a Downtown or where it was. They selected a site which had been found for them by a friend.

PART II: COMPARATIVE ATTRIBUTES

This series of questions was asked to get a sense of how the Downtown compared with areas that the business was previously located in or areas where the business has since moved to. These questions compared general locational factors. Crime, environment, access and parking, and city policies and services were addressed in greater detail in other parts of the survey.

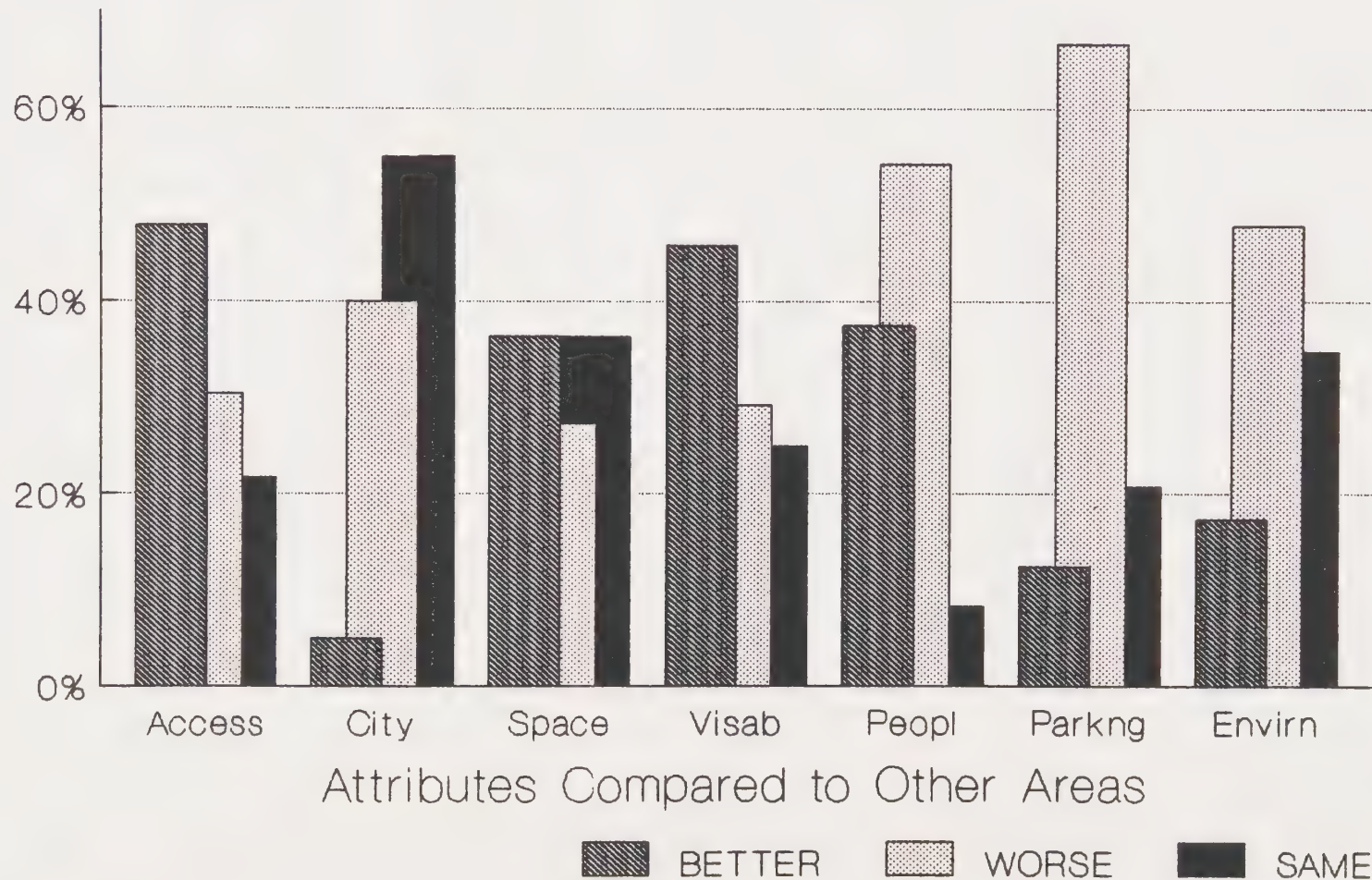
FINDINGS: According to the respondents, the Downtown has:

- o Higher rent (65%) than in other areas;
- o The same quality of goods and services (43%) as in other areas;
- o More competition among like businesses (39%) than in other areas;
- o More crime (66.7%) than in other areas;
- o Better access (47.8%);
- o Better visibility (45.8) for businesses;
- o The same (55%) or worse (40%) City Policies than in other areas;
- o The same (36.4%) or better (36.4%) availability or amount of space than other areas;
- o Worse types of people (54.2%) on the streets than in other areas;
- o Worse parking (66.7%) than in other areas;
- o Worse (47.8%) general physical environment than other areas.

Chart 1 illustrates some of those initial responses.

HOW DOWNTOWN STACKS UP

First Responses





Many of these items are not usually within a city's capacity to control and had not been initially identified by the 1986 Merchants Survey as problem areas. Nevertheless, some of the comments about those items not queried in depth are as follows:

Rent

Many businesses said that, for a long time, rent in the Downtown had been much lower than in other comparable places. However, recently, rent in the Downtown has risen very fast and very high. In some cases rent tripled in one month.

- o One small businessperson said his rent went up from three hundred dollars a month to \$600 the next and to \$900 the following month.
- o One businessperson said that rent had jumped to \$2.50/sq.ft. and that jump had prevented him from finding equivalent space in the Downtown when he had to vacate a previous Downtown location.
- o Yet another businessman commented that he had to move out when his rent reached 90 cents/sq.ft.
- o A few businesses commented that an affect of the commercial rent control initiated in the Elmwood district, was increasing rents in the Downtown as landlords did not want to get caught with low rent in the event rent control were to be applied to the Downtown area as well.

For some businesses, especially those connected with national chains and those whose clientele was less Berkeley specific (e.g., regional), rent was a minor or of no consideration in the location decision. For others, however, particularly the small individually owned business, rent was a major consideration. And among those businesses that moved from the Downtown to other areas in Berkeley, rent in the Downtown was the central location criteria.

Quality of Goods and Services

A majority of the businesses felt that the quality of goods and services was the same as elsewhere. However, 35 percent of the respondents in all business groups thought that the quality of the goods and services available in the Downtown were worse than those available in other areas. This was

particularly true of businesses that had been in Downtown for over five years. Among this group, nearly all said that the goods and services in the Downtown had deteriorated significantly. All the businesses that left Berkeley and that responded to this felt the goods and services in the Downtown were lower than the area they relocated to, while only 21 percent of the New to Downtown group felt the goods and services were higher.

Business Competition

Competition is a business decision not under the control of nor considered to be within the purview of the city. Most businesses said that assessment of business competition was a central part of doing business and that competition was good for business and made one work harder to attract and keep customers. On the other hand, many of the reasons why New to Downtown businesses located in the Downtown are related to the absence of competition. Many businesses thought the area would be a good place to do business because there was not a similar business to serve the Downtown clientele and that there was a market niche to be filled.

Space

Many businesses felt that the availability and amount of space to rent for their businesses was better or the same as in other areas. However, 27 percent of all the businesses responding to this question said that it was difficult to find space in the Downtown for their operations because of the size. Small spaces with low rents were hard to find. At the same time, some businesses felt that medium sized spaces were hard to find as well. This problem was discussed in the 1986 Merchants survey and should be followed up to get an idea of whether or not there is sufficient diversity of space to accommodate an adequate mixture of small, medium and large users.

PART III: CITY POLICIES AND SERVICES

FINDINGS: The central finding of this set of questions was that the initial perception of the debilitating effect of city policies and the actual experience of businesses is quite different. Five out of six businesses said they had never been directly affected by a City policy; nearly all of the businesses felt that fire and police services were superb; public works issues such as lighting, garbage, sidewalk and street repair received the most negative comments.

In the comparative attributes section above, 40 percent of all businesses responding to this question noted that City Policies and Services were Worse in the Downtown than in other areas, however 55 percent said city policies and services were the same. For those businesses located in Berkeley, the general comment was that policies in Berkeley were terrible all over.

City services and policy questions were asked in more detail later in the survey. When asked how often their businesses had been directly affected by a decision at City Hall, five out of the six respondents stated they had never been directly affected by a decision at city hall. Only one business noted that the Smoking Ordinance had required some internal adjustment, but had no serious consequences on its business activity. One "New to Berkeley" business, not directly asked this question, commented that its business had been directly affected by the use permit process and delays in processing.

Many people commented that indirectly, their businesses were affected by "city politics" meaning the indirect effects of rent control, the seemingly arbitrariness of the voters, the city council, or building permit people, the absence of a development plan or policy for the city. Some businesses repeated sentiments that implied that the absence of policy, vision, or leadership had greater dilatory affects on their businesses than any one specific policy had.

When asked whether or not the city could have done anything to help businesses to stay or locate into the Downtown, nearly 60 percent of those who responded to the question, said that the city could have done nothing to help them. However, 43 percent said the city could have helped them.

When asked whether or not the city did anything to help the business (stay in or) to locate into the Downtown, nine of the 12 businesses responding to this question (75%), said no. Of the three businesses that stated the city helped, one said the city was great in giving it a building permit before it had a use permit because he had some renovation activity to

do. Another business said the city had helped by waiving a public hearing on a beer and wine license situation since it was only moving a block or two away from where it had originally been located. One business said that the city had helped it get employees when it needed them.

When asked what the city could/should do to help, a lot of suggestions came forth, including:

- o Reorient the City Council toward business needs, develop leadership and vision for Berkeley, improve city department responsiveness to businesses, erase seemingly arbitrary application of rules;
- o Enhance the atmosphere of the Downtown by cleaning up the area, fix the streets and sidewalks, get rid of the dirt and litter, enforce loitering laws;
- o Help small businesses to obtain financing to renovate their sites; find space for small shops (1000 - 2500 sq.ft.); stabilize, control, or subsidize commercial rents; provide small business advocacy and negotiations assistance;

One business suggested making economic information available to businesses regarding market potential, income projections of Berkeley inhabitants, etc., and another business suggested providing small business loans. Some information assistance is already available at the city level, but small business loans are not provided by the city in the Downtown area. The survey responses indicate that there is a need for greater public awareness of city programs to assist businesses.

When asked whether or not they had contacted the city about their concerns, 61.5 percent of those responding said they had not contacted the city about issues relating to their location to or from the Downtown nor about other issues.

Over one-third of the businesses responding to this question, however, have had contact with the city about specific locational concerns and/or about a variety of issues related to doing business in Berkeley.

Of these, 64.3 percent (9 out of 14) said that the city staff had been responsive and very responsive. However over one-third, 35.7 said the city had not been responsive.

General complaints seem to revolve around public works issues. Garbage pickup and trash bins were the most often mentioned items. Particularly among new businesses, there was general discontent on how the city dealt with getting trash bins to the stores. In some cases, businesses were told it would take 4 to 6 weeks for a bin to be delivered.

In reality, the process took much longer. Some businesses went out and purchased their own trash bin. Others called the city on numerous occasions to get different and often contradictory statements. Most businesses felt they could generally be content with the situation if the city would "say flat-out" that the process will take 3 months or more rather than string the business along with promises that it could not keep. This sentiment was repeated about building permits, hearings, etc.

Garbage pick up, particularly for restaurants is a serious issue. One restaurant owner has had to take garbage from his restaurant to his home because there are not enough pick-ups and the smells from the rotting garbage filters into the eating place turning customers away.

One businessman commented at his surprise that the city responded to a clean-up survey taken a few months ago with actual clean-up crews only a couple of weeks after the survey.

City Fire and Police Services

With two exceptions, Berkeley Police and Fire received outstanding praise by businesses for their prompt response and immediate attention. Sixty-six percent of those directly asked how responsive the fire and police had been to their needs, said the fire and police had been very responsive. The remaining respondents said the departments had been responsive. Two businesses not specifically asked this question commented that police response time was slow. Those businesses that have "Left Berkeley", commented that they wished they could have taken the fire and police with them, and that both the fire and police in Berkeley were top notch and far superior to the departments in other cities.

PART IV: ACCESSIBILITY AND PARKING

FINDINGS: The central finding of this section is that the Downtown is quite easy to get to and move around in. Parking is extremely difficult for shoppers because of the decreasing supply of parking slots and spaces and for employees because of the costs of long-term parking.

This series of questions had three general parts. One part had to do with getting to the Downtown in general. Another set of questions related to the ability to get around in the Downtown once people got there. The final component addressed parking specifically.

Getting to the Downtown

According to the merchants surveyed, getting to the Downtown is not a problem. About 82 percent of the 21 respondents said it was easy or very easy for their employees to get to the place of business, and 71 percent thought it was easy or very easy for their customers to get to their place of business.

Getting around in the Downtown

All of the 22 businesses responding to this set of questions said that getting around in Berkeley's Downtown by foot was easy or very easy. The foot traffic in Berkeley's Downtown was deemed to be a highly valued attribute by nearly every business.

Likewise, 90 percent of the 21 respondents thought that getting around in the Downtown by public transit was easy.

However, only 66 percent of the respondents said that getting around by car was easy or very easy. Difficulties in getting around by car had to do with traffic congestion, parking problems, etc., which will be discussed below.

Parking

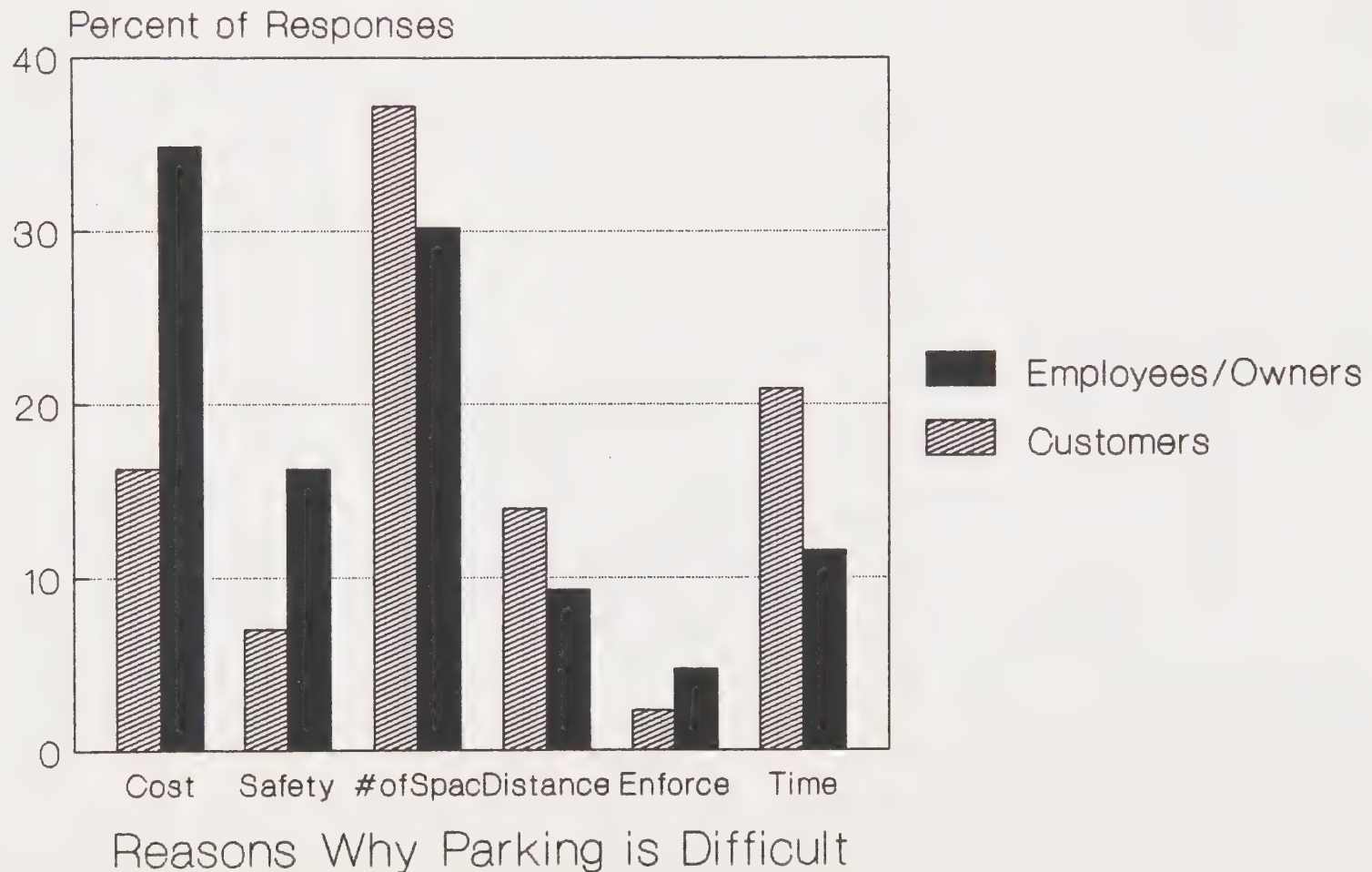
Parking in the Downtown is a serious concern. Not one of the respondents said that parking in the downtown was very easy. Of the 36 responses, only 4 said that it was easy to park in the Downtown and two of these had parking slots behind their places of business. The reasons why parking is difficult varies for customers and for employees. **Chart 2** illustrates those differences.

For customers, the limited number of slots and spaces, the length of parking time, the cost of parking and the distance from business sites were the key problems mentioned. It was also noted that customers do not know where public parking structures and lots are because they are not well marked.

For some businesses, the parking time among those meters surrounding or adjacent to their businesses was too short; for others, the time was too long. For businesses that catered and depended upon people being able to stop for a short time to pickup a pack of cigarettes or a sandwich, parking time needed to be shorter, perhaps 5-10 minute spaces. For others, the one-hour meters were too short. The point was brought out that the Downtown should be a desirable place to shop for many items, not just one item. One hour meter times did not permit "shopping" which was browsing, comparison of price and style, lunching, and more shopping.

DOWNTOWN PARKING ISSUES

Customers and Employees





For employees, the costs of long-term parking, number of spaces and slots, and safety are the primary issues contributing to difficult parking in the Downtown.

Long-term parking for the working person is expensive, ranging from \$4-8/day. Monthly parking ranges from \$40 to \$55/month. At \$3.35 to \$5.25/hour wage levels, this means that, after taxes, a person works about two hours a day to pay for parking.

Not everyone has to drive. However, many people in retail businesses drive to work for two basic reasons: Security and the necessity to pick-up items needed to conduct business.

Safety and security issues are important components of the parking situation. Many of the workers in the Downtown retail sector are women. Many of the women respondents indicated that safety of parking structures and lots are a major concern. It was pointed out that female retail workers drive because of security issues. That is, although stores close in the evening, workers stay beyond the closing times, sometimes until late at night restocking goods and are not comfortable taking public transit or waiting on street corners for buses. Closing the shop and walking down the street at night is a very unpleasant experience for many women workers and business owners. In this regard, one business pointed out that parking garages close at about 10 p.m. and their workers often worked until later. This means that workers must go to the garage and get their cars, find an on-street parking spot and walk back to their stores to continue their work.

Secondly, many retail workers and business owners have to drive in order to be able to pick up shipments that have been shipped but not delivered. The need to have a vehicle is especially true for restaurants where often a bread, or lettuce delivery did not arrive, a freezer went out or the refrigeration unit of the soda box malfunctioned. In these cases, restaurant people must leave the shop drive to the a large supermarket and pick-up what they need for that day's meals. These people need to be able to park near to their shops for short trips during the day, or else they need empty loading zones nearby to be able to get goods delivered.

With respect to limited parking slots several respondents noted that lots/garages tended to oversell their slots. The effect of this practice is that even though businesses pay for monthly parking, they may not actually get to park. For

example, a few businesses said that if they had to vacate their slot to go and pick up or deliver something, often they had to wait for long periods upon returning to the garage because there were no slots available. One business woman told me that she added on an additional 45 minutes coming to the garage or lot just to wait for a slot even though she purchased parking on a monthly basis.

Delivery or Pick-up of Merchandise

The limited number of slots and spaces is the most often cited reason why it is hard for merchandise delivery. Nearly 60 percent of all merchants responding, said that getting merchandise to and from their businesses was difficult or very difficult. The primary reason which was cited was the absence of short-term parking areas such as loading zones. For many businesses, there are not enough loading zones. For others, it doesn't matter how many loading zones there are, because other people park in the zones which means that the delivery person has to double park and clog traffic further.

Parking Mechanisms

Local merchants had a number of suggestions for correcting the situation. The most often mentioned suggestion was to build new parking garages and lots. However, there were a number of things that emerged which could be explored further:

- o There could be periodic surveys of short-term business parking needs to determine which businesses need loading zones and quick stop places and which loading zones are no longer appropriate for the type of businesses located nearby.
- o Increased enforcement of loading zones was suggested. In addition, steep penalties could be assessed to non-delivery autos parked in loading zones and which cause double parking. For example, if a truck is double parked because a car is blocking the loading zone and causing the truck to double park, then the car could receive a double ticket/fine, one for parking illegally in a loading zone, another for causing a truck to double park.

- o A short-term solution to the garage/lot crunch for long-term parkers, might be to encourage garage owners to hire attendants to park vehicles for patrons as slots become available. This is a process that occurs in many urban parking garages but it may increase parking costs as well.
- o Parking metered time could be varied by distance to the downtown, longer meters in more outlying areas, shorter meters in the Downtown interior.
- o It was also suggested that meters be installed with variable rates, for example, 25 cents for the first hour, 50 cents for the second hour, \$4.00 for the third hour, etc.
- o Increase visibility of public parking structures or lots through painting or signing so that the public can find them easier.

PART V: PHYSICAL AND SOCIAL ENVIRONMENT

FINDINGS: The survey found that traffic and street lighting are the most positive factors of the downtown, litter is the most negative. Sunlight, wind and noise are neutral issues for downtown businesses. Socially, college students, office workers, and the elderly have the most positive impact on Downtown businesses. The homeless have the greatest negative impact on downtown businesses and children are neutral.

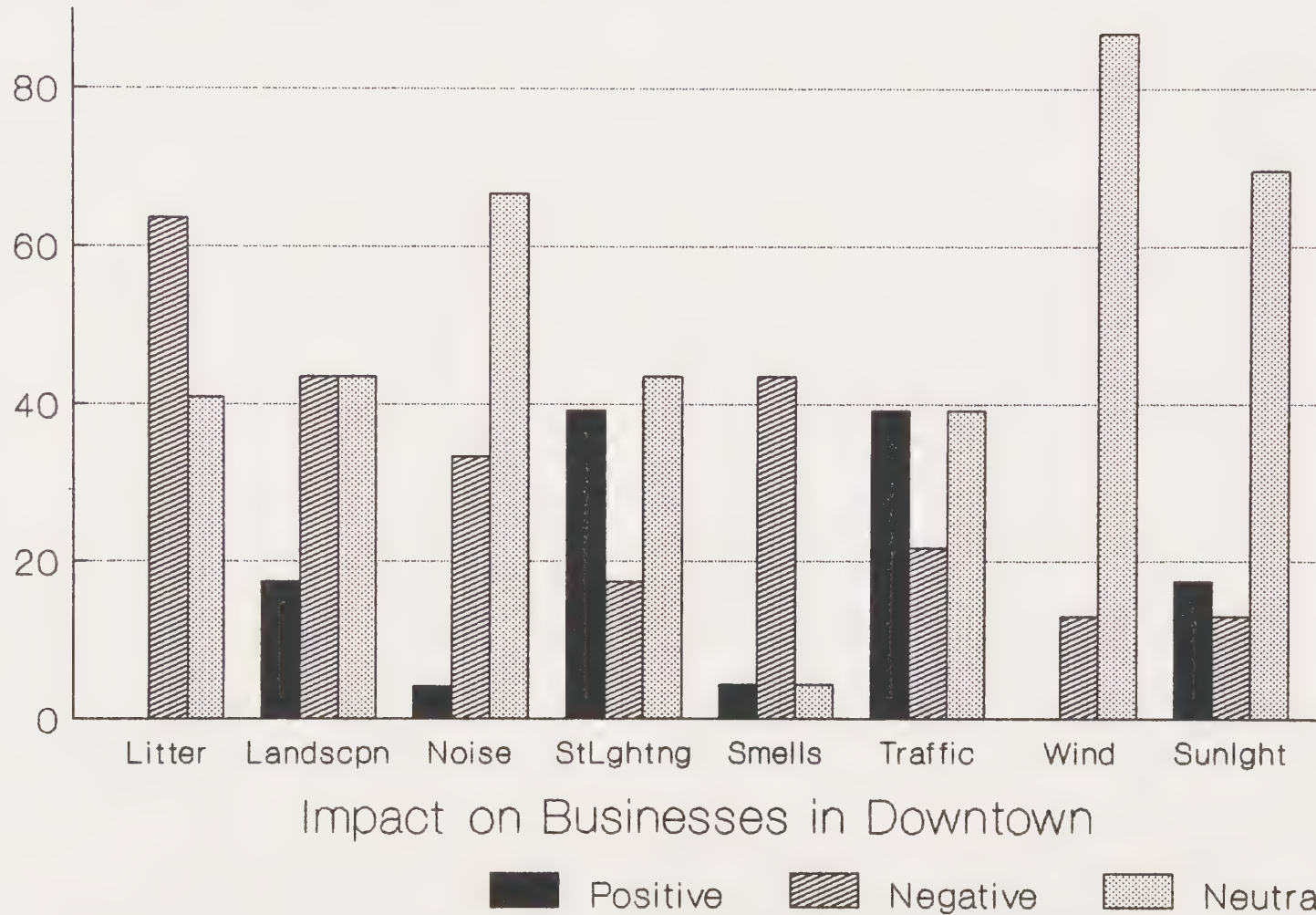
These question attempted to understand whether certain facets of the downtown environment affected the operation of businesses or location decisions, and if so, whether the impact was positive or negative. **Chart 3** highlights the findings regarding the physical environment of the area.

Physical Environment

The important point here is to isolate those factors that do not affect businesses or location decisions. Of all the physical factors noted, noise (67%), wind (87%), sunlight (70%) were most often identified as being neutral. For some businesses, however, these factors did have negative effects such as fading of clothing from the sunlight, fewer customers

PHYSICAL ENVIRONMENT

Percent of Responses



for take out food on windy days, etc. The noise issues relate to garbage pickup, buses and truck traffic, but overall are considered part of any "downtown" environment.

The factor having the single most often cited negative impact was litter (64%), and there were many comments on the need of the city to clean up the downtown, sweep the streets, etc.

There were a number of factors that had mixed responses. Landscaping, for example was considered both a neutral and a negative factor. Several businesses laughed at this question and asked, "What landscaping?", stating that landscaping was neutral because it was absent. Others said that there should be more landscaping and that it would help to make the downtown more attractive. Those businesses that stated landscaping was a negative factor, noted that the trees, in some seasons, emitted a sticky substance on the sidewalk and cars that could not be removed, that was tracked into the stores, and that made outdoor eating unpleasant. For some merchants, landscaping was a negative factor because it was an object of vandalism and left unsightly empty planters or stumps.

About 40 percent of the respondents thought that street lighting was a positive factor. These businesses tended to be open at night. To the remaining 44 percent, street lighting was a neutral issue. A smaller 17 percent of the merchants responded that street lighting in the downtown had a negative affect, because it was inadequate. This was particularly true for businesses who had women walking home, to buses or to cars at night and reflected general security issues about the downtown.

A surprising result of the survey was the negative impact of odors and smells on businesses. Generally, these responses reflected two distinct types of smells. One was related to garbage and trash smells having to do with garbage pickup. The second type of odors seemed to be localized near the BART area and are linked by respondents to the people who gather in that general area. Some people thought the combination of litter, urine, trash, body odors and food were the sources of unpleasant aromas in that area.

The impact of traffic on the downtown merchants was seen as equally split between neutral and positive (39.1%). Only 22 percent of all the businesses responding to this question

felt that traffic was negative. It should be noted here that in this context, "traffic" was most often interpreted to mean parking. A few businesses noted the distinction between the two and noted that traffic was congested because people were searching for parking.

Social Environment

The social environment questions asked whether or not the types of people frequenting the downtown affected their business or location decision, and if so, whether the impact was positive or negative. **Chart 4** illustrates the findings regarding the social environment.

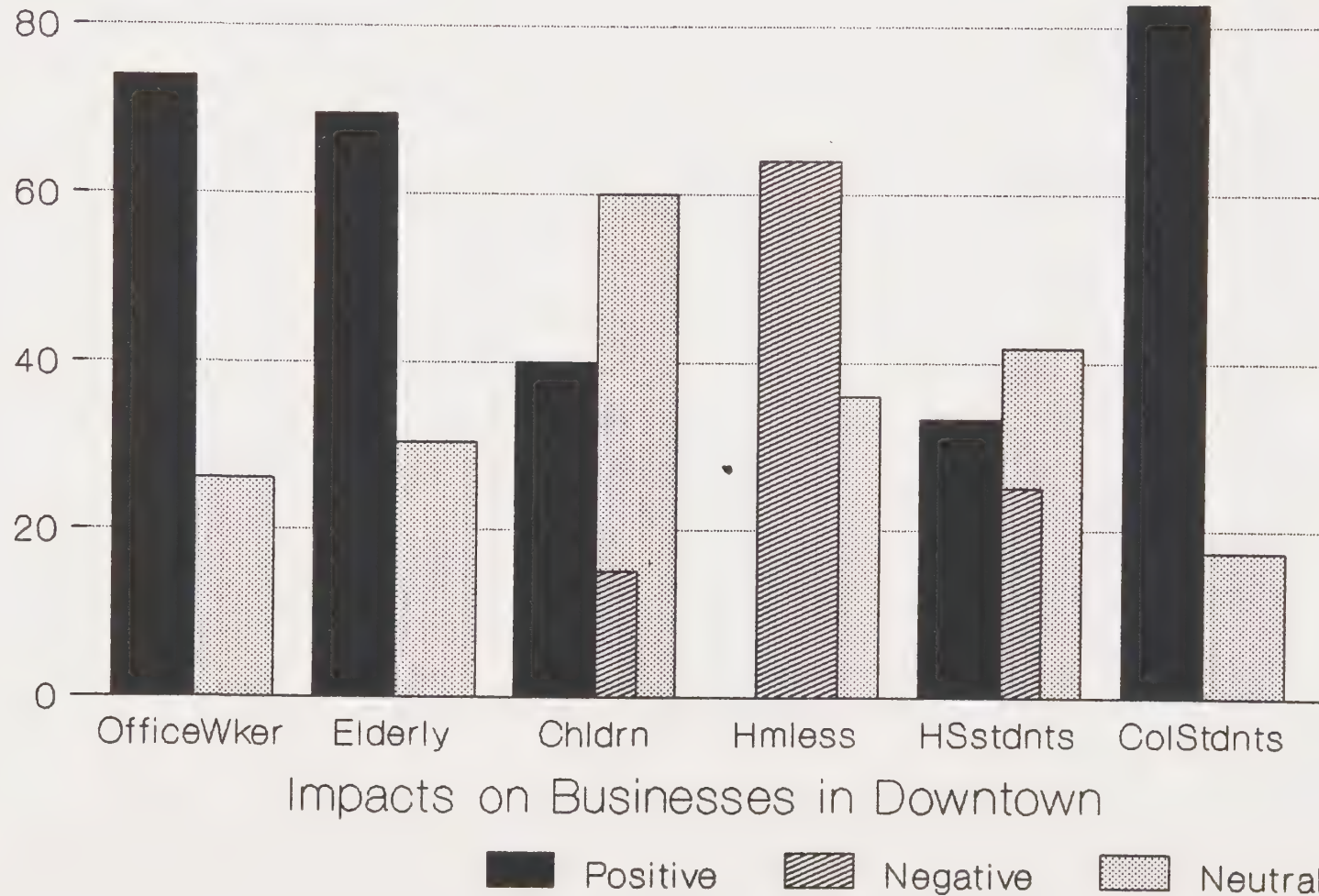
Many businesses interpreted this question to mean "Who are your customers/clientele?" Because of this interpretation, several businesses noted that all the types of people mentioned had a neutral impact. For these businesses, their clientele were drawn from the region and included families, other businesses, professors, etc.

Nevertheless, college students, office workers and the elderly were identified as having the most positive impact on businesses. As could be expected, the homeless population was considered to have a negative impact on businesses, and children were the most neutral. High school students received mixed responses. Certainly many of the existing businesses catered to the young high school shopper and worker particularly in the fast foods and apparel stores. At the same time, as many businesses noted, some high school students could be a problem because of their rowdiness and threat of shoplifting, although many businesses said the kids, in general, were not the shoplifters.

When asked this question, several businesses responded with, "This is Berkeley", explaining that a certain amount of street people, panhandlers, homeless, etc., were to be expected and had, therefore, a minimal impact on their location decisions.

SOCIAL ENVIRONMENT

Percent of Responses



The primary concern about the "street people" had to do with the perception these people give to the area in general. Some businesses said they were embarrassed to have their clients come to their places of business when it was surrounded by such people and felt they lost a certain amount of "client confidence" as a result. One business person noted that the street people looked dangerous and were rude to elderly persons. Another, commented on the open drug dealing that occurred in the streets and that this type of activity did not lend an air of confidence to the area.

PART VI: CRIME IN THE DOWNTOWN

FINDINGS: The survey found that crime in the Downtown is perceived to be higher than the actual occurrence of crime.

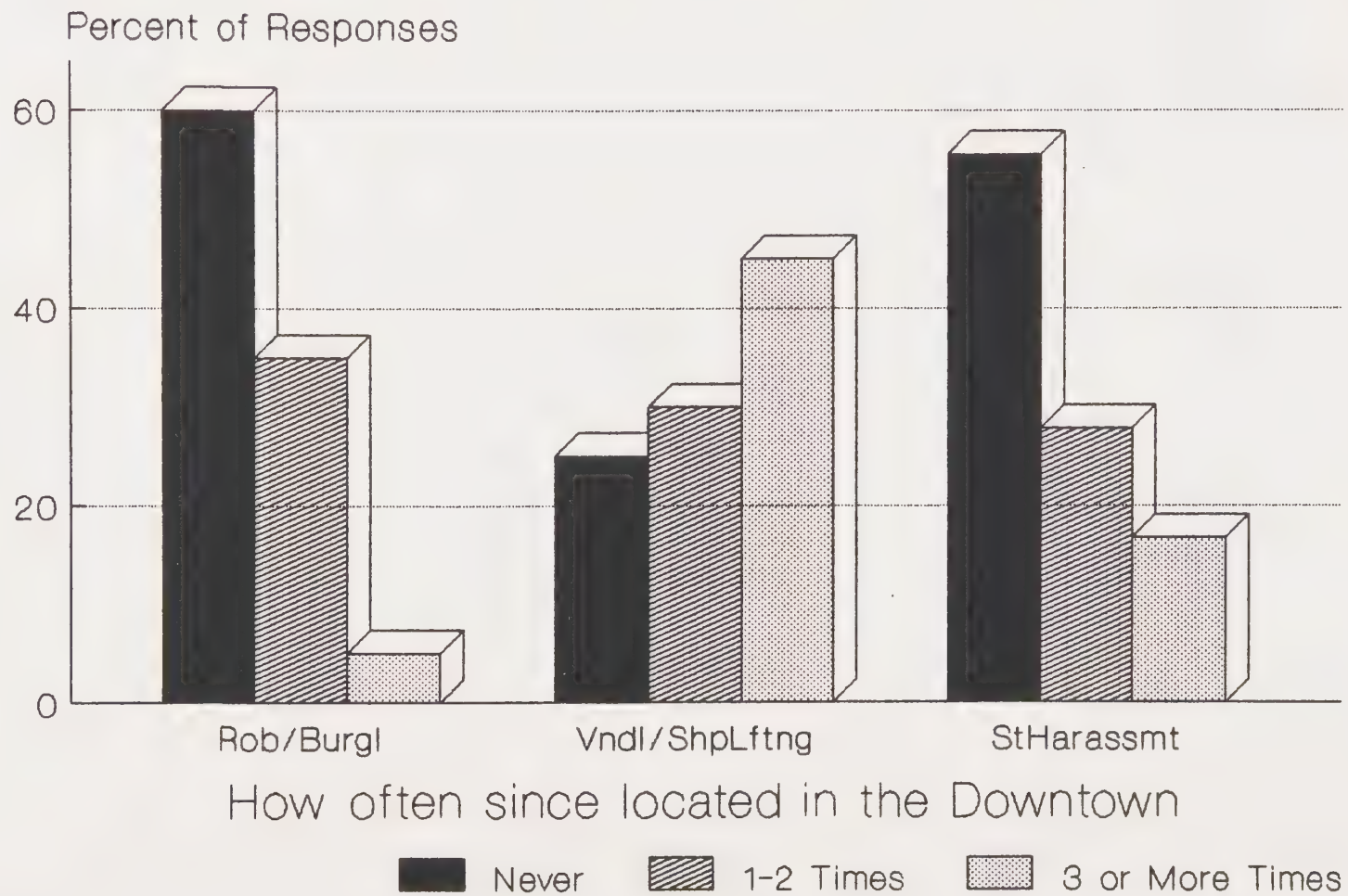
As mentioned in another section of this report, safety and security issues are important for many workers in the downtown, particularly for the women. Nevertheless, the perception of crime in the downtown may be greater than actual experiences of crime. **Chart 5** illustrates the findings regarding the occurrences of crime in the downtown.

In the comparative attributes section of the survey (Part II above), about 67 percent of the respondents said that the downtown had more crime than other places. In the section focusing on crime the findings were somewhat surprising. For example, of the 20 businesses asked how often their place of business had been robbed or burglarized, 60 percent said never, of the remainder, 35 percent said once or twice. Originally, this question had been designed for a response of "once or twice a year," but that answer turned out to be far too often. One business said that it had been robbed or burglarized more than three times since it had been in the Downtown.

Most of the "crime" seems to be shoplifting, vandalism, and graffiti. Forty-five percent of the respondents said that their store had been the victim of one or more of these activities 3 or more times, some said daily, while 30 percent said these activities occurred once or twice. Nevertheless, one-quarter of the businesses said they had never had such problems. A surprising number of businesses did not even include these incidents in concepts of crime. For them, graffiti, vandalism and shoplifting were more of a nuisance

OCCURRENCE OF CRIME

In Downtown Berkeley



than a crime. Some businesses even noted that shoplifting was part of the costs of doing business and they never even kept track of how often it occurred although they are sure things are shoplifted often.

Over half of all the respondents answering said that they or their employees had never been harassed or endangered on the streets. Three businesses said that their employees had been harassed 3 or more times. One employer said that an employee had a purse snatched, the other employers said that they had experienced hostility 3 or 4 times a year from panhandlers who become verbally hostile if refused.

Overall, it is likely that there is much less crime in the Downtown than there is thought to exist. In fact, one chain business noted that, of all the other stores located throughout the Bay Area, the Berkeley Downtown store had the lowest incidence of crime.

This is not to say, however, that there is no crime in the downtown at all. In fact, one shop has been "hit" 7 times in the last 5 months. This shop and a business immediately adjacent to it in the Trumpet Vine Court have had varying types of incidents. This area, which is not as visible from the street, is particularly vulnerable; and unless security is improved, illustrates the crime problems that businesses may face in similar types of developments.

PART VII: POLICY IMPLICATIONS

Although the number of businesses that have been surveyed is very small, there are some policy issues that have been highlighted through this process.

Retail Types

Berkeley's downtown, like other downtowns, has a wide variety of types of businesses including the "homegrown", the "mom and pop", the "franchise", the "branch", and the "chain". With the exception of restaurants, Berkeley's downtown may no longer be the incubation center for small homegrown firms or mom and pops because of the costs of competition, availability of small spaces for small stores and high rent.

According to the survey, it appears that older homegrown businesses are leaving the downtown while chains are moving in. However, the sample is too small to assume that chains are pushing out small business. In fact, a major reason given among these businesses for leaving the downtown is city's politics which make it unable to address business needs.

At the same time, there are many new and relatively young businesses starting up in Berkeley, although not in the downtown. This means that while other parts of Berkeley are "incubating" businesses, the downtown may well be location of choice for these businesses when they mature and expand. In fact, two businesses surveyed did say that they were beginning to think about locating another store or expanding in the downtown.

A subsequent working document will discuss each type of retail business in more detail. In the meantime, an issue that is more important than the type of structure the business is comprised of is the market the business serves. Does the businesses serve the people who work and live in the downtown, the campus, residents of Berkeley, or the region?

In the absence of additional research, the survey in itself, does not give adequate information on the balance of retail types, the potential market or the economic impact.

Nevertheless, the survey does suggest that small businesses such as "mom and pops" serving the local market, that is, Berkeley residents, the neighborhood or downtown workers are experiencing difficulty staying in the downtown because of rising rents and the absence of appropriately small sites.

Rent in the downtown is still an attractive factor for most businesses moving into the area. However, (perhaps in response to anticipated rent control) rent in the downtown has risen.

If the objective is to maintain an economic environment that is conducive to "homegrown" and "mom and pops", or more importantly a group of businesses that serve the local population, then the committee will have to address the issue of providing lower cost space for these businesses.

A secondary issue, which the survey has highlighted but which needs further analysis is related to the size of retail space. The 1985 Merchants Survey indicated that size of available retail space was an important obstacle for the location of small businesses. This recent survey suggests that the conditions in the Downtown remain the same and that small shops cannot find adequately small spaces. The committee may have to address the issue of providing smaller spaces to some types of retail activities.

Subsequent working papers will discuss strategies for addressing both rent and space issues affecting business in the Downtown. A number of businesses identified as desirable by the Downtown Plan Committee are ideal candidates for these strategies. Shoe repair shops, for example, are "mom and pops" that serve the local working and resident population and for which rising rents in the downtown result in out-migration.

Parking and Accessibility

One indication of the vibrancy of the downtown is, in fact, the parking problem. Cities that have dying or depressed central business districts have no parking problem. When there is an oversupply of parking and an undersupply of stores, there is serious trouble.

Similarly, traffic is positive despite it's annoyance and frustration. Traffic is the most inexpensive marketing tool available to small businesses (except for "word of mouth"). Chains or franchises have access to corporate promotional

campaigns, television and newspaper advertisements, etc. But for the independent businesses person, the more people that pass by his shop, the more people see his place of business, and the more potential customers he has.

Traffic and parking are important issues that will affect long-term retention and attraction of certain kinds of businesses. For example, traffic count was the central central location criteria for Pier One Imports on Shattuck Avenue. The exclusion of automobile traffic in the downtown will have impacts on some businesses. Those that are auto-traffic dependent may have to relocate to more appropriate sites.

With respect to parking, department stores require significant parking availability which, in turn, may affect Berkeley's ability to attract such uses to the downtown. Secondly, if housing is a desirable use in the downtown, the costs, location, security, of parking must be addressed as well.

One way of easing the parking problems for existing businesses may be to examine long-term vs. short-term parking needs within the context of desirable results. For example, some of the restaurants, deli's, shoe repair, quick stop places need short-term parking so that goods can be delivered and picked up. If, however, the target is to encourage foot traffic rather than automobile traffic, then strategies to adjust location of short-term parking spaces or businesses requiring short-term parking might be advisable.

In addition, long-term parking needs of workers as opposed to customers has to be addressed. Issues of long-term parking costs, night-time security, flexibility, etc. are central to employees. Long-term parking for customers which encourages the "browse/lunch/buy" activity as opposed to the short-term parking which is essentially designed to rotate parking spaces and people.

Some more specific policy mechanisms related to parking are set out in the section on accessibility and parking and include parking enforcement, reevaluation of short, long-term and loading zone parking, increasing visibility of parking structures and lots, etc.

Downtown's Image

Clearly a central issue to the location of businesses to or from the downtown is tied to how the downtown is perceived. The image of the downtown will have long-term impacts on the type of businesses the city is able to attract. Again, department stores, particularly upscale stores, desire to locate in areas that have an image that compliments the goods and services they offer to the consumer.

The image of the downtown plays an important role in determining how businesses and consumers perceive other attributes of the downtown. For example, the survey illustrated that the perception of crime in the downtown is greater than the actual occurrence of crime. The difference between the two realities lies in the image that the downtown perpetuates.

Physical components of the environment such as, trash, dirt, litter, odors, dim lighting, are elements that erode business confidence, shopper convenience, and worker security. Clearly, the way the downtown looks, smells, and "feels" reflects the City's commitment to the business community and its residents. If the city is trying to retain local businesses and to encourage location to the Downtown, then it will have to deal with the public works activities that have direct impacts on the business community.

City Commitment

There are broad economic implications that stem from the "image issues" and that have to do with how Berkeley is perceived to relate to the private sector-whether big business or small business.

Business has little confidence in Berkeley's ability to move away from crisis management and toward long-term planning, toward fiscal responsibility, and toward implementing the downtown plan.

Investor confidence is at risk here. Any type of development in the downtown will require the participation of the private sector, and yet, many businesses express overt hostility toward city officials and a general sense of futility about the council's ability to provide leadership and demonstrate political courage in the face of development controversy.

If the Downtown Plan Committee has a desire to retain existing businesses or to attract new retail businesses to the Downtown, then the committee must address the issue of private sector confidence. Therefore, at some point, the Downtown Plan Committee may have to address how the city will go about supporting the business community while continuing to enhance the social and economic well-being of the entire community.

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This concludes the report of the survey findings. Attached are survey questionnaires, a list of businesses surveyed and identified for the survey, and the results of the survey for each group.

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ATTACHMENTS

ATTACHMENT 1

The following sets out the businesses that were identified for the survey. Businesses that were contacted are indicated by asterisk.

GROUP 1: LEFT DOWNTOWN TO OTHER BERKELEY NEIGHBORHOODS

- * 1. Ifshin Violins
- 2. Dharma Trading Company
- * 3. Piggy Malones
- * 4. Owl Shoe Repair

Total surveyed: 3 (75%)

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GROUP 2: LEFT DOWNTOWN AND LEFT BERKELEY

- | | | |
|------|-----------------------------|---|
| 1. | Suited for Success | Not able to contact new owners. |
| * 2. | Poppy Fabric & Trim | |
| * 3. | Whites Jewelers | |
| * 4. | Consumers Distributing | Out of business. |
| 5. | Upstart Crow | Out of business. |
| 6. | Hinks | Out of business. |
| 7. | City Cafe | Out of business. |
| * 8. | Educational Testing Service | Although not a "retail business, ETS was contacted because it was a large Downtown employer that has recently moved to Emerville. |

Total Surveyed: 4 (50%)

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GROUP 3: NEW TO DOWNTOWN:

- | | | | |
|---|-----|----------------------------|--|
| | 1. | Sheldon Fox Associates | No such listing, may be out of business. |
| * | 2. | Penguin Yogurt | |
| * | 3. | Marin Mountain Bikes | |
| * | 4. | Clothestime | |
| * | 5. | Hit & Miss | |
| | 6. | Rap's | Phone number out-of-service for over a week. |
| * | 7. | Ritz Cameras | |
| * | 8. | Marika | |
| * | 9. | Fred's Market | |
| | 10. | Simply Special Store | No answer for over one week. |
| | 11. | Holistic Harmony | No phone number. |
| * | 12. | School of Classical Ballet | |
| * | 13. | Panini | |
| * | 14. | Mrs. Fields | |
| * | 15. | E-Z Stop Deli | |
| * | 16. | Games of Berkeley | |
| * | 17. | The Middle East Restaurant | |
| * | 18. | Thrifty Drug Store | |
| * | 19. | Paper Arts (New Owner) | |

Total surveyed: 15 (78.9%)

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GROUP 4: NEW TO BERKELEY

- | | | | |
|---|----|-------------------------|--------------------|
| * | 1. | The Clothing Co. | |
| * | 2. | Body Dyamizes | |
| | 3. | Samplly Specialty Store | Unable to contact. |
| * | 4. | Erawar Market | |
| | 5. | Footwear First | Unable to contact. |
| * | 6. | Durant Shoe Repair | |
| * | 7. | Viva Tacqueria | |
| * | 8. | Bridge Creek Restaurant | |
| * | 9. | Pier One Imports | |

Total surveyed: 7 (78%)

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ALL BUSINESSES

SMPL SIZE	RESPNDTS	%OF TOTAL
40	29	72.5%

PART I: LENGTH OF TIME

	#RES	1yr/less	%ofTOT1-3yr	%ofTOT3-5yr	%ofTOT	5-10yr	%ofTOT	10+yr	%ofTOT		
1. InBus	25	6	24.0%	3	12.0%	2	8.0%	3	12.0%	11	44.0%
2. Before	8	1	12.5%	2	25.0%	3	37.5%	0	0.0%	2	25.0%
3. Prsent	26	14	53.8%	12	46.2%						

PART II: COMPARATIVE FACTORS

	#Reso	HIGHER%RES	LOWER%RES	SAME %RES
1. Rent	23	15 65.2%	5 21.7%	3 13.0%
2. Goods	23	5 21.7%	8 34.8%	10 43.5%
<hr/>				
		MORE	LESS	SAME
3. Comp	22	9 39.1%	6 26.1%	7 30.4%
4. Crime	21	14 66.7%	2 9.5%	5 23.8%
<hr/>				
		BETTER	WORSE	SAME
5. Acces	23	11 47.8%	7 30.4%	5 21.7%
6. City	20	1 5.0%	8 40.0%	11 55.0%
7. Space	22	8 36.4%	6 27.3%	8 36.4%
8. Visab	24	11 45.8%	7 29.2%	6 25.0%
9. Peopl	24	9 37.5%	13 54.2%	2 8.3%
10. Parkn	24	3 12.5%	16 66.7%	5 20.8%
11. Envir	23	4 17.4%	11 47.8%	8 34.8%

PART III: CITY POLICIES & SERVICES

	#RES	NO	%ofRES	YES	%ofRES		
1. CldHlo	21	12	57.1%	9	42.9%		
2. Cntct?	13	8	61.5%	5	38.5%		
<hr/>							
		VRESP		RESPN	NOTRSPN		
3. Rspnce	14	4	28.6%	5	35.7%	5	35.7%

PART IV: ACCESSIBILITY

	#RES	VEASY	%ofRES	EASY	%ofRES	DIFFI	%ofRES	VERYDIF	%ofRES
1. Foot	22	10	45.5%	12	54.5%	0	0.0%	0	0.0%
2. Car	21	2	9.5%	12	57.1%	6	28.6%	1	4.8%
3. PubTran	21	7	33.3%	12	57.1%	1	4.8%	1	4.8%
4. Merch	22	3	13.6%	5	22.7%	8	36.4%	5	22.7%
5. Employee	21	3	13.6%	15	68.2%	3	13.6%	3	13.6%
6. Customr	21	0	0.0%	15	71.4%	2	9.5%	4	19.0%
TOTAL	128	25	19.5%	71	55.5%	20	15.6%	14	10.9%

PARKING FOR:									
1. Customers	19	0		2	10.5%	4	21.1%	13	68.4%
2. Employees	17	0		2	11.8%	4	23.5%	11	64.7%

PARKING FOR CUSTOMERS				PARKING FOR EMPLOYEES			
	#ANS	%ofTOT		#ANS	%ofTOT		
a. Cost	7	15.2%		16	34.8%		
b. Safety	3	6.5%		7	15.2%		
c. #of Spaces	18	39.1%		15	32.6%		
d. Distance	6	13.0%		4	8.7%		
e. Enfrment	1	2.2%		2	4.3%		
f. Time	10	21.7%		5	10.9%		
g. Other	1	2.2%		1	2.2%		
TOTAL	46			50			

PART V: ENVIRONMENT

	#ANS	POS	%	NEG	%	NEUT	%
1.Litter	23	0	0.0%	14	63.6%	9	40.9%
2.Lndscping	23	4	17.4%	10	43.5%	10	43.5%
3.Noise	24	1	4.2%	8	33.3%	16	66.7%
4.StLghtng	23	9	39.1%	4	17.4%	10	43.5%
5.Smells	23	1	4.3%	10	43.5%	1	4.3%
6.Traffic	23	9	39.1%	5	21.7%	9	39.1%
7.Wind	23	0	0.0%	3	13.0%	20	87.0%
8.Sunlight	23	4	17.4%	3	13.0%	16	69.6%
9.Other	1	0	0.0%	1	100.0%	0	0.0%
TOTAL	140	24	17.1%	34	24.3%	72	51.4%

STREET PEOPLE

	#ANS	POS %	NEG %	NEUT %
1.OfficeWkr	23	17 73.9%	0 0.0%	6 26.1%
2.Elderly	23	16 69.6%	0 0.0%	7 30.4%
3.Chldrn	20	8 40.0%	3 15.0%	12 60.0%
4.Homeless	25	0 0.0%	16 64.0%	9 36.0%
5.HSstdnts	24	8 33.3%	6 25.0%	10 41.7%
6.College	23	19 82.6%	0 0.0%	4 17.4%
TOTAL	138	68 49.3%	25 18.1%	48 34.8%

PART VI: CRIME

	#ANS	NEVER %	1or2 %	3+ %
1.Robbed/Burg	20	12 60.0%	7 35.0%	1 5.0%
2.Vnd1/ShLft	20	5 25.0%	6 30.0%	9 45.0%
3.St.Hrass	18	10 55.6%	5 27.8%	3 16.7%
TOTAL	58	27 46.6%	18 31.0%	13 22.4%

GROUP 1: LEFT DT TO OTHER BERKELEY

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SMPL SIZE	RESPNDTS	%OF TOTAL
4	3	75.0%

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PART I: LENGTH OF TIME

	1yr/less	%ofTOT1-3yr	%ofTOT3-5yr	%ofTOT5-10yr	%ofTOT 10+yr	%ofTOT
1. InDT	0	0.0%	0	0.0%	1	33.3%
2. Prsent	0	0.0%	3	100.0%	0	0.0%

=====

PART II: COMPARATIVE FACTORS

	#Resp	HIGHER%RES	LOWER %RES	SAME %RES
1. Rent	3	1 33.3%	1 33.3%	1 33.3%
2. Goods	3	1 33.3%	0 0.0%	2 66.7%

		MORE	LESS
3. Comp	3	1 33.3%	0 0.0%
4. Crime	3	1 33.3%	0 0.0%

		BETTER	WORSE	SAME
5. Acces	3	2 66.7%	1 33.3%	0 0.0%
6. City	3	1 33.3%	0 0.0%	2 66.7%
7. Space	3	0 0.0%	3 100.0%	0 0.0%
8. Visab	3	3 100.0%	0 0.0%	0 0.0%
9. Peopl	3	0 0.0%	2 66.7%	1 33.3%
10. Parkn	3	0 0.0%	2 66.7%	1 33.3%
11. Envir	3	0 0.0%	2 66.7%	1 33.3%

=====

PART III: CITY POLICIES & SERVICES

	#RES	NO	%ofRES	YES	%ofRES
1. CldHlp	3	1 33.3%		2 66.7%	
2. Cntct?	3	1 33.3%		2 66.7%	

	VRESP	RESPN	NOTRSPN
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3. Rspnce	2	0	0.0%	1	50.0%	1	50.0%
4. FirPol	3	1	33.3%	2	66.7%	0	0.0%
<hr/>							
		NEVER		1-3		3+	
5. CtyHal	3	3	100.0%	0	0.0%	0	0.0%

PART IV: ACCESSIBILITY

	#RES	VEASY	%ofRES	EASY	%ofRES	DIFFI	%ofRES	VERYDIF	%ofRES
1. Foot	3	1	33.3%	2	66.7%	0	0.0%	0	0.0%
2. Car	3	1	33.3%	2	66.7%	0	0.0%	0	0.0%
3. PubTran	3	1	33.3%	2	66.7%	0	0.0%	0	0.0%
4. Merch	3	1	33.3%	1	33.3%	1	33.3%	0	0.0%
5. Emplvee	3	0	0.0%	3	100.0%	0	0.0%	0	0.0%
6. Customr	3	0	0.0%	3	100.0%	0	0.0%	0	0.0%
TOTAL	18	4	22.2%	13	72.2%	1	5.6%	0	0.0%

PARKING FOR:

1. Customers	3	0	0.0%	0	0.0%	1	33.3%	2	66.7%
2. Employees	3	0	0.0%	0	0.0%	1	33.3%	2	66.7%

PARKING FOR CUSTOMERS

#ANS %ofTOT

a. Cost	1	20.0%
b. Safety	0	0.0%
c. #of Spaces	3	60.0%
d. Distance	0	0.0%
e. Enfrment	0	0.0%
f. Time	1	20.0%
g. Other	0	0.0%
TOTAL	5	

PARKING FOR EMPLOYEES

#ANS %ofTOT

2	40.0%
0	0.0%
3	60.0%
0	0.0%
0	0.0%
1	20.0%
0	0.0%
6	

PART V: ENVIRONMENT

	#ANS	POS	%	NEG	%	NEUT	%
1.Litter	3	0	0.0%	1	33.3%	2	66.7%
2.Lndscping	3	0	0.0%	1	33.3%	2	66.7%
3.Noise	3	0	0.0%	1	33.3%	2	66.7%
4.StLghtng	3	1	33.3%	0	0.0%	2	66.7%
5.Smells	3	0	0.0%	2	66.7%	1	33.3%
6.Traffic	3	2	66.7%	1	33.3%	0	0.0%
7.Wind	3	0	0.0%	0	0.0%	3	100.0%
8.Sunlight	3	0	0.0%	0	0.0%	3	100.0%
9.Other	3	0	0.0%	0	0.0%	0	0.0%
TOTAL	21	3	14.3%	4	19.0%	11	52.4%

STREET PEOPLE

	#ANS	POS %	NEG %	NEUT %
1.OfficeWkr	3	2 66.7%	0 0.0%	1 33.3%
2.Elderly	3	2 66.7%	0 0.0%	1 33.3%
3.Chldr	3	1 33.3%	0 0.0%	2 66.7%
4.Hmless	3	0 0.0%	1 33.3%	2 66.7%
5.HSstdnts	3	0 0.0%	0 0.0%	3 100.0%
6.College	3	3 100.0%	0 0.0%	0 0.0%
TOTAL	18	8 44.4%	1 5.6%	9 50.0%

PART VI: CRIME

	#ANS	NEVER %	1or2 %	3+ %
1.Robbed/Burg	3	3 100.0%	0 0.0%	0 0.0%
2.Vndr/ShLft	3	1 33.3%	2 66.7%	0 0.0%
3.St.Hrass	3	3 100.0%	0 0.0%	0 0.0%
TOTAL	9	7 38.9%	2 11.1%	0 0.0%

GROUP 2 LEFT DOWNTOWN AND LEFT BERKELEY

=====

SAMPL SIZE	RESPNDTS	%OF TOTAL
8	4	50.0%

=====

PART I: LENGTH OF TIME

	#RES	1yr/less	%ofTOT1-3yr	%ofTOT3-5yr	%ofTOT 5-10yr	%ofTOT 10+yr	%ofTOT
1. InBus	3		0.0%	0.0%	0.0%	0.0%	3 100.0%
2. Prsent	3	2	66.7%	33.3%	0.0%	0.0%	0.0%

=====

PART II: COMPARATIVE FACTORS

	#Resp	HIGHER%RES	LOWER%RES	SAME %RES
1. Rent	3	2 66.7%	1 33.3%	0.0%
2. Goods	3	0.0%	3 100.0%	0.0%

	#RES	MORE	LESS	SAME
3. Comp	3	0.0%	0.0%	2 66.7%
4. Crime	3	2 66.7%	0.0%	0.0%

	#RES	BETTER	WORSE	SAME
5. Acces	3	1 33.3%	1 33.3%	1 33.3%
6. City	3	0.0%	2 66.7%	1 33.3%
7. Space	3	1 33.3%	1 33.3%	1 33.3%
8. Visab	3	2 66.7%	1 33.3%	0.0%
9. Peopl	3	1 33.3%	2 66.7%	0.0%
10. Parkn	3	1 33.3%	2 66.7%	0.0%
11. Envir	3	1 33.3%	2 66.7%	0.0%

=====

PART III: CITY POLICIES & SERVICES

	#RES	NO	%ofRES	YES	%ofRES
1. ClidHlp	3	1 33.3%		2 66.7%	
2. Cntct?	3	0.0%		3 100.0%	

	VRESP	RESPN	NOTRSPN
--	-------	-------	---------

3. Rspnce	3	1	33.3%	1	33.3%	1	33.3%
4. Fire/P	3	3	100.0%		0.0%		0.0%

		NEVER		1-2		3+	
5. CtyHal	3	2	66.7%	1	33.3%		0.0%

PART IV: ACCESSIBILITY

	#RES	VEASY	%ofRES	EASY	%ofRES	DIFFI	%ofRES	VERYDIF	%ofRES
1. Foot	3	2	66.7%		0.0%		0.0%		0.0%
2. Car	3		0.0%	1	33.3%	2	66.7%		0.0%
3. PubTran	3	1	33.3%	2	66.7%		0.0%		0.0%
4. Merch	3		0.0%	1	33.3%	2	66.7%		0.0%
5. Employee	3	1	33.3%	1	33.3%	1	33.3%		0.0%
6. Customr	3		0.0%	2	66.7%	1	33.3%		0.0%
TOTAL	18	4	22.2%	7	38.9%	6	33.3%	0	0.0%

PARKING FOR:

1. Customers	3			1	33.3%		2	66.7%
2. Employees	3				0.0%		3	100.0%

PARKING FOR CUSTOMERS

#ANS %ofTOT

a. Cost	3	25.0%
b. Safety		0.0%
c. #of Spaces	3	25.0%
d. Distance	2	16.7%
e. Enfrment	1	8.3%
f. Time	3	25.0%
g. Other		0.0%
TOTAL	12	

PARKING FOR EMPLOYEES

#ANS %ofTOT

a. Cost	2	16.7%
b. Safety	2	16.7%
c. #of Spaces	3	25.0%
d. Distance		0.0%
e. Enfrment		0.0%
f. Time	2	16.7%
g. Other		0.0%
TOTAL	9	

PART V: ENVIRONMENT

	#ANS	POS	%	NEG	%	NEUT	%
1.Litter	3		0.0%	2	66.7%	1	33.3%
2.Lndscping	3	2	66.7%		0.0%	1	33.3%
3.Noise	3		0.0%	2	66.7%	1	33.3%
4.StLghtng	3	1	33.3%	2	66.7%		0.0%
5.Smells	3		0.0%	2	66.7%	1	33.3%
6.Traffic	3	1	33.3%		0.0%	2	66.7%
7.Wind	3		0.0%		0.0%	3	100.0%
8.Sunlight	3		0.0%		0.0%	3	100.0%
9.Other	0						ERR
TOTAL	18	2	11.1%	6	33.3%	10	55.6%

STREET PEOPLE

	#ANS	POS	%	NEG	%	NEUT	%
1.OfficeWkr	3	1	33.3%		0.0%	2	66.7%
2.Elderly	3	1	33.3%		0.0%	2	66.7%
3.Chldrn	3		0.0%		0.0%	3	100.0%
4.Hmless	3		0.0%	3	100.0%		0.0%
5.HSstdnts	3	1	33.3%		0.0%	2	66.7%
6.College	3	2	66.7%		0.0%	1	33.3%
TOTAL	18	5	27.8%	3	16.7%	10	55.6%

PART VI: CRIME

	#ANS	NEVER	%	1or2	%	3+	%
1.Robbed/Burg	3		0.0%	3	100.0%		0.0%
2.Vnd1/ShLft	3		0.0%	2	66.7%	1	33.3%
3.St.Hrass	3	1	33.3%	1	33.3%	1	33.3%
TOTAL	9	1	5.6%	6	33.3%	2	11.1%

GROUP 3: NEW TO DOWNTOWN

=====

SAMPL SIZE	RESPNDTS	%OF TOTAL
19	15	78.9%

=====

PART I: LENGTH OF TIME

	1yr/less	%ofTOT1-3yr	%ofTOT3-5yr	%ofTOT5-10yr	%ofTOT 10+yr	%ofTOT
1. InBus	2	13.3%	6.7%	13.3%	20.0%	46.7%
2. Before	1	6.7%	13.3%	13.3%	0.0%	13.3%
3. Prsent	12	80.0%	20.0%	0.0%	0.0%	0.0%

=====

PART II: COMPARATIVE FACTORS

	#Resp	HIGHER%RES	LOWER%RES	SAME %RES
1. Rent	14	10 71.4%	3 21.4%	1 7.1%
2. Goods	14	3 21.4%	4 28.6%	7 50.0%

		MORE	LESS	SAME
3. Comp	14	5 35.7%	5 35.7%	4 28.6%
4. Crime	12	8 66.7%	2 16.7%	2 16.7%

		BETTER	WORSE	SAME
5. Acces	15	8 53.3%	4 26.7%	3 20.0%
6. City	12	0 0.0%	5 41.7%	7 58.3%
7. Space	14	6 42.9%	2 14.3%	6 42.9%
8. Visab	14	5 35.7%	5 35.7%	4 28.6%
9. Peopl	14	5 35.7%	8 57.1%	1 7.1%
10. Parkn	14	2 14.3%	9 64.3%	3 21.4%
11. Envir	14	3 21.4%	5 35.7%	6 42.9%

=====

PART III: CITY POLICIES & SERVICES

	#RES	NO	%ofRES	YES	%ofRES	%ofRES
aa. Help	12	9	75.0%	3	25.0%	
1. CldHlp	8	4	50.0%	4	50.0%	
2. Cntct?	5	3	60.0%	2	40.0%	

=====

	VRESP	RESPN	NOTRSPN
3. Rspnce	8	3 37.5%	3 37.5% 2 25.0%

PART IV: ACCESSIBILITY

	#RES	VEASY	%ofRES	EASY	%ofRES	DIFFI	%ofRES	VERYDIF	%ofRES
1. Foot	14	7	50.0%	7	50.0%	0	0.0%	0	0.0%
2. Car	13	1	7.7%	8	61.5%	3	23.1%	1	7.7%
3. PubTran	13	5	38.5%	7	53.8%	0	0.0%	1	7.7%
4. Merch	14	2	14.3%	3	21.4%	4	28.6%	5	35.7%
5. Empllyee	13	2	14.3%	10	71.4%	1	7.1%	0	0.0%
6. Customr	13	0	0.0%	9	69.2%	1	7.7%	3	23.1%
TOTAL	80	17	21.3%	44	55.0%	9	11.3%	10	12.5%

PARKING FOR:

1. Customers	12	0	2	16.7%	2	16.7%	8	66.7%
2. Employees	12	0	2	16.7%	3	25.0%	7	58.3%

PARKING FOR CUSTOMERS

#ANS %ofTOT

a. Cost	3	11.5%
b. Safety	3	11.5%
c. #of Spaces	10	38.5%
d. Distance	4	15.4%
e. Enfrment	0	0.0%
f. Time	5	19.2%
g. Other	1	3.8%
TOTAL	26	

PARKING FOR EMPLOYEES

#ANS %ofTOT

a. Cost	11	42.3%
b. Safety	4	15.4%
c. #of Spaces	8	30.8%
d. Distance	3	11.5%
e. Enfrment	2	7.7%
f. Time	1	3.8%
g. Other	1	3.8%
TOTAL	30	

PART V: ENVIRONMENT

	#ANS	POS	%	NEG	%	NEUT	%
1.Litter	14	0	0.0%	8	57.1%	6	42.9%
2.Lndscping	15	2	13.3%	8	53.3%	5	33.3%
3.Noise	15	1	6.7%	4	26.7%	10	66.7%
4.StLghtng	14	6	42.9%	2	14.3%	6	42.9%
5.Smells	14	1	7.1%	5	35.7%	8	57.1%
6.Traffic	14	6	42.9%	2	14.3%	6	42.9%
7.Wind	14	0	0.0%	3	21.4%	11	78.6%
8.Sunlight	14	4	28.6%	3	21.4%	7	50.0%
9.Other	1	0	0.0%	1	100.0%	0	0.0%
TOTAL	86	18	20.9%	20	23.3%	48	55.8%

STREET PEOPLE

	#ANS	POS	%	NEG	%	NEUT	%
1.OfficeWkr	14	13	92.9%	0	0.0%	1	7.1%
2.Elderly	14	12	85.7%	0	0.0%	2	14.3%
3.Chldrn	14	7	50.0%	3	21.4%	4	28.6%
4.Hmless	15	0	0.0%	8	53.3%	7	46.7%
5.HSstdnts	15	7	46.7%	5	33.3%	3	20.0%
6.College	14	13	92.9%	0	0.0%	1	7.1%
TOTAL	86	52	60.5%	16	18.6%	18	20.9%

PART VI: CRIME

	#ANS	NEVER	%	1or2	%	3+	%
1.Robbed/Burg	12	8	66.7%	3	25.0%	1	8.3%
2.Vnd1/ShLft	12	3	25.0%	2	16.7%	7	58.3%
3.St.Hrass	12	7	58.3%	3	25.0%	2	16.7%
TOTAL:	36	18	50.0%	8	22.2%	10	27.8%

GROUP 4: NEW TO BERKELEY

=====

SMPL SIZE	RESPNDTS	%OF TOTAL
9	7	77.8%

=====

PART I: LENGTH OF TIME

	1yr/less	%ofTOT1-3yr	%ofTOT3-5yr	%ofTOT5-10yr	%ofTOT 10+yr	%ofTOT
1. InBus	4	57.1%	2	28.6%	0.0%	0.0%
2. Before		0.0%	1	14.3%	0.0%	0.0%
4. Prsent	4	57.1%	2	28.6%	0.0%	0.0%
		YES	NO			
5. BrkDT?	1		6			

=====

PART II: COMPARATIVE FACTORS

	#Resp	HIGHER%RES	LOWER%RES	SAME %RES
1. Rent	1	1		
2. Goods			1	
		MORE	LESS	SAME
3. Comp			1	
4. Crime	1			
		BETTER	WORSE	SAME
5. Acces				1
6. City				1
7. Space				
8. Visab			1	
9. Peopl			1	
10. Parkng				1
11. Envir				

=====

PART III: CITY POLICIES & SERVICES

	#RES	NO	%ofRES	YES	%ofRES	%ofRES
1. CldHlp		1				
2. Cntct?				1		
		VRESP		RESPN		NOTRSPN

=====

1

	#ANS	POS	%	NEG	%	NEUT	%
1.Litter				1			
2.Lndscping				1			
3.Noise				1			
4.StLghtng						1	
5.Smells						1	
6.Traffic						1	
7.Wind						1	
8.Sunlight						1	
9.Other							

	#ANS	POS	%	NEG	%	NEUT	%
1.OfficeWkr		1					
2.Elderly		1					
3.Chldrn						1	
4.Homeless				1			
5.HSstndts				1			
6.College		1					
TOTAL							

GROUP 1: LEFT DOWNTOWN TO OTHER BERKELEY NEIGHBORHOODS No.

Date: _____

Business Name: _____

Name of Respondent: _____ Position: _____

PART I:

1. How long were you located in the Downtown?
 1yr or less_____ 1-3yrs_____ 3-5yrs_____ 5-10yrs_____ 10+yrs_____
2. How long have you been located at your present site:
 1yr or less_____ 1-3yrs_____
3. What was the primary reason you moved from the downtown? _____

PART II:

How does the Downtown compare with the area you are now located in with regard to the following factors:

- | | | | |
|--|-------------|------------|-----------|
| 1. Rent: | Higher_____ | Lower_____ | Same_____ |
| 2. Quality of goods & services: | Higher_____ | Lower_____ | Same_____ |
| 3. Business Competition: | More_____ | Less_____ | Same_____ |
| 4. Crime: | More_____ | Less_____ | Same_____ |
| 5. Access by auto, public transportation & foot: | Better_____ | Worse_____ | Same_____ |
| 6. City policies and services: | Better_____ | Worse_____ | Same_____ |
| 7. Amount & Availability of space: | Better_____ | Worse_____ | Same_____ |
| 8. Visibility of your business: | Better_____ | Worse_____ | Same_____ |
| 9. Types of people on the street: | Better_____ | Worse_____ | Same_____ |
| 10. Amount & Availability of Parking: | Better_____ | Worse_____ | Same_____ |
| 11. Physical environment of area: | Better_____ | Worse_____ | Same_____ |

=====

PART III: CITY POLICIES & SERVICES

1. Is there anything that the City of Berkeley could have done to help you stay in the downtown? No_____.
- 1a. If yes, what specifically could the city have done to help you?

2. Did you contact the City about your concerns? Yes____ No____
3. How responsive were city officials and staff to your needs as a business person in the downtown?

Very		Not
Responsive	Responsive	Responsive
_____	_____	_____
4. How responsive have the fire and police been to your needs as a business person in the downtown?

5. How often has your business been directly affected by a decision at City Hall?
Never____ 1-3 times/year____ 3+ times/yr____
6. Did the following policies affect your ability to conduct business in Downtown Berkeley?

	Yes	No
a. Zoning	_____	_____
b. Building Permits	_____	_____
c. Financing	_____	_____
d. Ordinances	_____	_____
e. Use Permits	_____	_____
f. Other _____	_____	_____
7. In what way?_____

=====

PART IV: ACCESSIBILITY IN DOWNTOWN BERKELEY

=====

	Very Easy	Easy	Difficult	Very Difficult
A. How easy or difficult was it:				
To get around in the downtown,				
1. By foot?	----	----	----	----
2. By car?	----	----	----	----
3. By public transportation?	----	----	----	----
4. For merchandize to be delivered to or picked up from your place of business?	----	----	----	----
If VE or VD, Why? _____				
5. For you and your employees to get to your place of business?	----	----	----	----
If VE or VD, Why? _____				
6. For your customers to get to your place of business?	----	----	----	----
If VE or VD, Why? _____				
B. With regard to parking, how easy or difficulty was it,				
1. For your customers to find parking in the downtown?	----	----	----	----
If VE or VD, Why? _____				
a. Cost of parking	----			
b. Safety of lots and structures	----			
c. Number of slots and spaces	----			
d. Distance from your business	----			
e. Enforcement of meters	----			
f. Length of parking times	----			
g. Other _____	----			
2. For you & your employees to find parking in the downtown?	----	----	----	----
If VE or VD, Why? _____				
a. Cost of parking	----			
b. Safety of lots and structures	----			
c. Number of slots and spaces	----			
d. Distance from your business	----			
e. Enforcement of meters	----			
f. Length of parking times	----			
g. Other _____	----			

=====

PART V: ENVIRONMENT IN THE DOWNTOWN

When you were located in Downtown Berkeley, what kind of impact did the following factors have on your business?

	<u>Positive</u>	<u>Negative</u>	<u>Neutral</u>
1. Litter	-----	-----	-----
2. Landscaping	-----	-----	-----
3. Noise	-----	-----	-----
4. Street lighting	-----	-----	-----
5. Odors/Smells	-----	-----	-----
6. Traffic	-----	-----	-----
7. Wind	-----	-----	-----
8. Sunlight	-----	-----	-----
9. Other _____	-----	-----	-----

What kind of impact did the following types of people have on your businesses when you were located in the Downtown?

	<u>Positive</u>	<u>Negative</u>	<u>Neutral</u>
1. Office workers	-----	-----	-----
2. Elderly	-----	-----	-----
3. Children	-----	-----	-----
4. Homeless	-----	-----	-----
5. High school students	-----	-----	-----
6. College students	-----	-----	-----

=====

PART VI: CRIME IN THE DOWNTOWN

- How often was your place of business robbed or burglarized when you were located in the downtown?
Never_____ 1-2 times/year_____ 3+ times/yr_____
- How often did your place of business or your merchandise get vandalized when you were located in the downtown? (Graffiti, windows or signs broken, exterior plants or merchandise destroyed?)
Never_____ 1-2 times/year_____ 3+ times/yr_____
- How often were your employees endangered or harassed by people in the streets?
Never_____ 1-2 times/year_____ 3+ times/yr_____

=====

Any suggestions for improving downtown business.

THANK YOU.

Handout from OED re city services.

=====

Notes:

GROUP 2: LEFT DOWNTOWN AND LEFT BERKELEY

No.

Date: _____

Business Name: _____

Name of Respondent: _____ Position: _____

PART I:

1. How long were you located in Berkeley?
 1yr or less_____ 1-3yrs_____ 3-5yrs_____ 5-10yrs_____ 10+yrs_____
2. How long have you been located at your present site:
 1yr or less_____ 1-3yrs_____
3. What was the primary reason you moved from Berkeley? _____

PART II:

How does the Downtown compare with the area you are now located in with regard to the following factors:

- | | | | |
|--|-------------|------------|-----------|
| 1. Rent: | Higher_____ | Lower_____ | Same_____ |
| 2. Quality of goods & services: | Higher_____ | Lower_____ | Same_____ |
| 3. Business Competition: | More_____ | Less_____ | Same_____ |
| 4. Crime: | More_____ | Less_____ | Same_____ |
| 5. Access by auto, public transportation & foot: | Better_____ | Worse_____ | Same_____ |
| 6. City policies and services: | Better_____ | Worse_____ | Same_____ |
| 7. Amount & Availability of space: | Better_____ | Worse_____ | Same_____ |
| 8. Visibility of your business: | Better_____ | Worse_____ | Same_____ |
| 9. Types of people on the street: | Better_____ | Worse_____ | Same_____ |
| 10. Amount & Availability of Parking: | Better_____ | Worse_____ | Same_____ |
| 11. Physical environment of area: | Better_____ | Worse_____ | Same_____ |

=====

PART III: CITY POLICIES & SERVICES

1. Is there anything that the City of Berkeley could have done to help you stay in Berkeley? No_____.

- 1a. If yes, what specifically could the City have done to help you?

2. Did you contact the City about your concerns? Yes_____ No_____

3. How responsive were City officials and staff to your needs as a business person in Berkeley?
- | Very Responsive | Responsive | Not Responsive |
|-----------------|------------|----------------|
| _____ | _____ | _____ |

4. How responsive were the fire and police departments to your needs as a business person in Berkeley?
- | | | |
|-------|-------|-------|
| _____ | _____ | _____ |
|-------|-------|-------|

5. How often has your business been directly affected by a decision at City Hall?
- Never___ 1-2 times/year___ 3+ times/yr___

6. Did the following policies affect your ability to conduct business in Berkeley?

- | | Yes_____ | No_____ |
|----------------------------|----------|---------|
| a. Zoning | _____ | _____ |
| b. Building Permits | _____ | _____ |
| c. Commercial Rent control | _____ | _____ |
| d. Financing | _____ | _____ |
| e. Ordinances | _____ | _____ |
| e. Use Permits | _____ | _____ |
| f. Other _____ | _____ | _____ |

7. In what way?_____

=====

PART IV: ACCESSIBILITY IN DOWNTOWN BERKELEY

When you were located in downtown Berkeley, how easy or how difficult was it:

	Very Easy	Easy	Difficult	Very Difficult
--	--------------	------	-----------	-------------------

A. To get around in the downtown?

- | | | | | |
|------------------------------|------|------|------|------|
| 1. By foot? | ---- | ---- | ---- | ---- |
| 2. By car? | ---- | ---- | ---- | ---- |
| 3. By public transportation? | ---- | ---- | ---- | ---- |

4. For merchandize or supplies to be delivered to or picked up from your place of business?

----	----	----	----
------	------	------	------

If VE or VD, Why? _____

5. For you and your employees to get to your place of business?

----	----	----	----
------	------	------	------

If VE or VD, Why? _____

6. For your customers to get to your place of business?

----	----	----	----
------	------	------	------

If VE or VD, Why? _____

B. With regard to parking, how easy or difficulty was it,

	Very Easy	Easy	Difficult	Very Difficult
--	--------------	------	-----------	-------------------

1. For your customers to find parking in the downtown?

----	----	----	----
------	------	------	------

If VE or VD, Why? _____

- | | | |
|----|-------------------------------|------|
| a. | Cost of parking | ---- |
| b. | Safety of lots and structures | ---- |
| c. | Number of slots and spaces | ---- |
| d. | Distance from your business | ---- |
| e. | Enforcement of meters | ---- |
| f. | Length of parking times | ---- |
| g. | Other _____ | ---- |

2. For you & your employees to find parking in the downtown?

----	----	----	----
------	------	------	------

If VE or VD, Why? _____

- | | | |
|----|-------------------------------|------|
| a. | Cost of parking | ---- |
| b. | Safety of lots and structures | ---- |
| c. | Number of slots and spaces | ---- |
| d. | Distance from your business | ---- |
| e. | Enforcement of meters | ---- |
| f. | Length of parking times | ---- |
| g. | Other _____ | ---- |

=====

PART V: ENVIRONMENT IN THE DOWNTOWN

When you were located in Downtown Berkeley, what kind of impact did the following factors have on your business?

	Positive	Negative	Neutral
1. Litter	-----	-----	-----
2. Landscaping	-----	-----	-----
3. Noise	-----	-----	-----
4. Street lighting	-----	-----	-----
5. Odors/Smells	-----	-----	-----
6. Traffic	-----	-----	-----
7. Wind	-----	-----	-----
8. Sunlight	-----	-----	-----
9. Other _____	-----	-----	-----

What kind of impact did the following types of people have on your business when you were located in the Downtown?

	Positive	Negative	Neutral
1. Office workers	-----	-----	-----
2. Elderly	-----	-----	-----
3. Children	-----	-----	-----
4. Homeless	-----	-----	-----
5. High school students	-----	-----	-----
6. College students	-----	-----	-----

=====

PART VI: CRIME IN THE DOWNTOWN

- How often was your place of business robbed or burglarized when you were located in Berkeley's downtown?
Never_____ 1-2 times/year_____ 3+ times/yr_____
- How often did your place of business or your merchandise get vandalized when you were located in the downtown? (Graffiti, windows or signs broken, exterior plants or merchandise destroyed?)
Never_____ 1-2 times/year_____ 3+ times/yr_____
- How often were your employees endangered or harassed by people in the streets?
Never_____ 1-2 times/year_____ 3+ times/yr_____

=====

Suggestions? THANKS. HANDOUT FROM OED

GROUP 3: NEW TO DOWNTOWN

Date: _____

Business Name: _____

Name of Respondent: _____ Position: _____

PART I:

1. How long have you been in business?
1yr or less_____ 1-3yrs_____ 3-5yrs_____ 5-10yrs_____ 10+yrs_____
2. How long were you in business at your previous site?
1yr or less_____ 1-3yrs_____ 3-5yrs_____ 5-10yrs_____ 10+yrs_____
3. How long have you been located at your present site:
1yr or less_____ 1-3yrs_____
4. What was the primary reason you moved to Downtown Berkeley?

PART II:

How does the Downtown compare with the area you were previously located in with regard to the following factors:

- | | | | |
|--|-------------|------------|-----------|
| 1. Rent: | Higher_____ | Lower_____ | Same_____ |
| 2. Quality of goods & services: | Higher_____ | Lower_____ | Same_____ |
| 3. Business Competition: | More_____ | Less_____ | Same_____ |
| 4. Crime: | More_____ | Less_____ | Same_____ |
| 5. Access by auto, public transportation & foot: | Better_____ | Worse_____ | Same_____ |
| 6. City policies and services: | Better_____ | Worse_____ | Same_____ |
| 7. Amount & Availability of space: | Better_____ | Worse_____ | Same_____ |
| 8. Visibility of your business: | Better_____ | Worse_____ | Same_____ |
| 9. Types of people on the street: | Better_____ | Worse_____ | Same_____ |
| 10. Amount & Availability of Parking: | Better_____ | Worse_____ | Same_____ |
| 11. Physical environment of area: | Better_____ | Worse_____ | Same_____ |
- =====

PART III: CITY POLICIES & SERVICES

aa. Did the City of Berkeley do anything to help you locate into the downtown area? No____. Yes____.

ab. If yes, please specify what the city did to help you.

1. If no, is there anything that the City of Berkeley could have done to help you locate in the downtown? No____. Yes____.

1a. If yes, what specifically could the city have done to help you?

2. Did you contact the City about your concerns? Yes____ No____

3. How responsive were city officials and staff to your needs as a business person in the downtown?	Very Responsive -----	Responsive -----	Not Responsive -----
---	-----------------------------	---------------------	----------------------------

PART IV: ACCESSIBILITY IN DOWNTOWN BERKELEY

	Very Easy	Easy	Difficult	Very Difficult
A. How easy or difficult is it:				
To get around in the downtown,				
1. By foot?	----	----	----	----
2. By car?	----	----	----	----
3. By public transportation?	----	----	----	----
4. For merchandize to be delivered to or picked up from your place of business?	----	----	----	----
If VE or VD, Why? _____				
5. For you and your employees to get to your place of business?	----	----	----	----
If VE or VD, Why? _____				
6. For your customers to get to your place of business?	----	----	----	----
If VE or VD, Why? _____				
B. With regard to parking, how easy or difficulty is it,				
1. For your customers to find parking in the downtown?	----	----	----	----
If VE or VD, Why? _____				
a. Cost of parking		----		
b. Safety of lots and structures		----		
c. Number of slots and spaces		----		
d. Distance from your business		----		
e. Enforcement of meters		----		
f. Length of parking times		----		
g. Other _____		----		
2. For you & your employees to find parking in the downtown?	----	----	----	----
If VE or VD, Why? _____				
a. Cost of parking		----		
b. Safety of lots and structures		----		
c. Number of slots and spaces		----		
d. Distance from your business		----		
e. Enforcement of meters		----		
f. Length of parking times		----		
g. Other _____		----		

=====

PART V: ENVIRONMENT IN THE DOWNTOWN

What kind of impact did the following factors have on your decision to locate in the Downtown?

	<u>Positive</u>	<u>Negative</u>	<u>Neutral</u>
1. Litter	-----	-----	-----
2. Landscaping	-----	-----	-----
3. Noise	-----	-----	-----
4. Street lighting	-----	-----	-----
5. Odors/Smells	-----	-----	-----
6. Traffic	-----	-----	-----
7. Wind	-----	-----	-----
8. Sunlight	-----	-----	-----
9. Other _____	-----	-----	-----

What kind of impact did the following types of people in the area have on your decision to locate in the Downtown?

	<u>Positive</u>	<u>Negative</u>	<u>Neutral</u>
1. Office workers	-----	-----	-----
2. Elderly	-----	-----	-----
3. Children	-----	-----	-----
4. Homeless	-----	-----	-----
5. High school students	-----	-----	-----
6. College students	-----	-----	-----

=====

PART VI: CRIME IN THE DOWNTOWN

- How often has your place of business been robbed or burglarized since you have located in the downtown?
Never_____ 1-2 times/year_____ 3+ times/yr_____
- How often has your place of business or your merchandise been vandalized since you located in the downtown? (Graffiti, windows or signs broken, exterior plants or merchandise destroyed?)
Never_____ 1-2 times/year_____ 3+ times/yr_____
- How often are your employees endangered or harassed by people in the streets?
Never_____ 1-2 times/year_____ 3+ times/yr_____

=====

THANK YOU.

Handout from OED re city services.

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GROUP 4: NEW TO BERKELEY

No.

Date: _____

Business Name: _____

Name of Respondent: _____ Position: _____

PART I:

1. How long have you been in business?
 1yr or less_____ 1-3yrs_____ 3-5yrs_____ 5-10yrs_____ 10+yrs_____
 2. How long were you in business at your previous site?
 1yr or less_____ 1-3yrs_____ 3-5yrs_____ 5-10yrs_____ 10+yrs_____
 3. What city did you do business in last?_____
 4. How long have you been located at your present site:
 1yr or less_____ 1-3yrs_____
 5. Did you consider locating in Berkeley's Downtown? No____. Yes____.
 6. If no, why?_____
- **** IF NO, STOP. *** THANK YOU, ETC.
- #. If yes, what was the primary reason you decided not to locate in the downtown?

PART II:

How does the Downtown compare with the area you chose to locate in with regard to the following factors:

- | | | | |
|--|-------------|------------|-----------|
| 1. Rent: | Higher_____ | Lower_____ | Same_____ |
| 2. Quality of goods & services: | Higher_____ | Lower_____ | Same_____ |
| 3. Business Competition: | More_____ | Less_____ | Same_____ |
| 4. Crime: | More_____ | Less_____ | Same_____ |
| 5. Access by auto, public transportation & foot: | Better_____ | Worse_____ | Same_____ |
| 6. City policies and services: | Better_____ | Worse_____ | Same_____ |
| 7. Amount & Availability of space: | Better_____ | Worse_____ | Same_____ |
| 8. Visibility of your business: | Better_____ | Worse_____ | Same_____ |
| 9. Types of people on the street: | Better_____ | Worse_____ | Same_____ |
| 10. Amount & Availability of Parking: | Better_____ | Worse_____ | Same_____ |
| 11. Physical environment of area: | Better_____ | Worse_____ | Same_____ |

=====

PART III: CITY POLICIES & SERVICES

1. Is there anything that the City of Berkeley could have done to help you locate in the downtown? No_____.
- 1a. If yes, what specifically could the city have done to help you?
-
-
2. Did you contact the City about your concerns? Yes_____ No_____
3. How responsive were city officials and staff to your needs as a business person? Very Not
 Responsive Responsive Responsive
 ----- ----- -----
6. Did the following policies governing the downtown affect your decision to locate elsewhere?
- | | <u>Yes</u> | <u>No</u> |
|---------------------|------------|-----------|
| a. Zoning | ----- | ----- |
| b. Building Permits | ----- | ----- |
| c. Financing | ----- | ----- |
| d. Ordinances | ----- | ----- |
| e. Use Permits | ----- | ----- |
| f. Other _____ | ----- | ----- |
7. In what way? _____
- =====

PART V: ENVIRONMENT IN THE DOWNTOWN

How did the following influence your assessment of the Downtown as a desirable place to do business?

	<u>Positive</u>	<u>Negative</u>	<u>Neutral</u>
1. Litter	_____	_____	_____
2. Landscaping	_____	_____	_____
3. Noise	_____	_____	_____
4. Street lighting	_____	_____	_____
5. Odors/Smells	_____	_____	_____
6. Traffic	_____	_____	_____
7. Wind	_____	_____	_____
8. Sunlight	_____	_____	_____
9. Other _____	_____	_____	_____

How did the following types of people influence your assessment of the Downtown as a desirable place to do business?

	<u>Positive</u>	<u>Negative</u>	<u>Neutral</u>
1. Office workers	_____	_____	_____
2. Elderly	_____	_____	_____
3. Children	_____	_____	_____
4. Homeless	_____	_____	_____
5. High school students	_____	_____	_____
6. College students	_____	_____	_____

=====

SUGGESTIONS? THANK YOU. OED INFORMATION HANDOUT.

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Table 1. Summary of data for the 1980-1981 season.

Station	Time	Value
1	10:00	1.2
2	10:15	1.5
3	10:30	1.8
4	10:45	2.1
5	11:00	2.4
6	11:15	2.7
7	11:30	3.0
8	11:45	3.3
9	12:00	3.6
10	12:15	3.9

Table 2. Summary of data for the 1982-1983 season.

Station	Time	Value
1	10:00	1.5
2	10:15	1.8
3	10:30	2.1
4	10:45	2.4
5	11:00	2.7
6	11:15	3.0
7	11:30	3.3
8	11:45	3.6
9	12:00	3.9
10	12:15	4.2

1. 10:00
2. 10:15
3. 10:30
4. 10:45
5. 11:00
6. 11:15
7. 11:30
8. 11:45
9. 12:00
10. 12:15